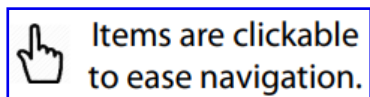




Harlow Retail Frontages Study 2022



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1. Introduction

- 1.1 In order to inform the preparation of planning policies, and reflecting the duty placed on the Council as Local Planning Authority to review the socio-economic and environmental conditions of the district, the Council annually assesses the retail frontages in Harlow. This provides analysis of changes that have occurred in the retail frontages.
- 1.2 The frontages of retail units extend interior uses outwards into the surrounding public space through visual contact. The majority of retail frontages are occupied by shops, but some frontages are occupied by other uses, such as banks, launderettes, travel agents, estate agents and tanning salons.

Monitoring of retail frontages

- 1.3 The monitoring of retail frontages is important to provide a barometer on the vitality, viability and success of Harlow's retail areas. Such monitoring also allows the identification of trends and the measurement of success of the local planning policies which seek to manage the proportions of uses within the retail frontages.

Town centre

- 1.4 Two types of retail frontage are found in the town centre – primary retail frontages and secondary retail frontages.
- 1.5 **Primary** retail frontage represents core retail activity, often identifiable by high levels of pedestrian footfall, higher rents and commercial rates, the presence of national retailers, and a high proportion of shops.
- 1.6 **Secondary** retail frontage is often characterised by lower rateable values, and the presence of independent and convenience retailers, and diverse and flexible uses (e.g. offices and restaurants as well as shops).
- 1.7 The Town Centre primary and secondary retail frontages have been published in a [Guidance Note](#) on the Council's website. More information can be found in Chapter 3.

Neighbourhood Centres and Hatches

- 1.8 The Study also considers the frontages of neighbourhood centres and hatches.
- 1.9 Neighbourhood centres and hatches are small, planned retail areas found in Harlow, normally located within/adjacent to residential areas, to serve local residents. They are characterised by lower rateable values, and the presence of independent and convenience retailers and diverse and flexible uses (e.g. launderettes, banks and restaurants as well as shops).

- 1.10 Hatches generally consist of between two and 10 units, with neighbourhood centres containing more.
- 1.11 The Harlow Local Development Plan designates neighbourhood centre frontages, but does not designate hatch frontages because these are not required for the purpose of the relevant policy. However, to assist with effective monitoring, this Study will continue to analyse hatches. More information can be found in Chapter 4.

Other areas

- 1.12 The Retail Frontages Study is not an extensive survey of **all** retail and non-retail uses in Harlow. There are other areas where units are present but are not identified as being retail frontages. Such areas include the retail parks in the north of the district.

2. National Legislation

Use Classes Order

- 2.1 Uses of land and buildings are categorised into various uses known as 'use classes' which are defined by The Town and Country Planning (Use Classes) Order 1987 (as amended).
- 2.2 With effect from 1 September 2020, the UCO was significantly amended and classes were changed. The uses most commonly found in retail areas are listed below. The former Use Class is given in brackets.

Class E – Commercial, Business and Service

- E(a): display or retail sale of goods, other than hot food *[formerly A1]*
 - Examples include shops, hairdressers, pet shops, sandwich bars and retail warehouses
- E(c): provision of financial services and professional services (other than health or medical services) *[formerly A2]*
 - Examples include banks, building societies, estate agents and employment agencies
- E(b): sale of food and drink for consumption (mostly) on the premises *[formerly A3]*
 - Examples include restaurants and cafes
- E(d): indoor sport, recreation or fitness
 - Examples include gyms *[formerly part of D2]*

Class F – Local Community and Learning

- F1(d): public libraries *[formerly part of D1]*

Sui Generis

Certain uses which do not fall within any use class – includes units for:

- theatres
- amusement arcades/centres or funfairs
- launderettes
- fuel stations
- hiring, selling and/or displaying motor vehicles
- taxi businesses
- retail warehouse clubs
- nightclubs
- casinos
- betting offices/shops
- pay day loan shops
- hot food takeaways (sale of food and drink for consumption (mostly) off the premises) *[formerly A5]*
- public houses, wine bars and drinking establishments *[formerly A4]*

- cinemas *[formerly part of D2]*

- 2.3 The Town and Country Planning Act 1990 (as amended) states that a change of use does not require planning permission, if the new use and former use are in the same use class. If they are not in the same use class then the change would require planning permission.
- 2.4 Under permitted development rights enacted by The Town and Country Planning (General Permitted Development) Order 1995 (as amended), changes of use between certain classes do not require planning permission.
- 2.5 Changing uses between those classified as Sui Generis, however, would require planning permission, because each use classified as Sui Generis technically occupies a use class of its own.

3. Local Policies

Harlow Local Development Plan (HLDP)

- 3.1 The HLDP was adopted in December 2020 and contains the following policies relating to retail frontages:

PR6 Primary and Secondary Frontages in the Town Centre

1. Primary Frontages

Development in the Town Centre primary frontages will be supported where:

- (a) the development is for Use Class A1;
- (b) the development is for Use Classes A2 or A3 and meets all the following criteria:
 - (i) 60% or more of the overall primary frontage length is retained for Use Class A1; and
 - (ii) the site has been vacant and actively marketed for Use Class A1 to the satisfaction of the Council for at least twelve months.

2. Secondary Frontages

With the exception of offices at ground floor, Main Town Centre Uses, evening and night-time uses will be permitted in the Town Centre secondary frontages.

Justification

15.31 Primary and secondary retail frontages protect and enhance the existing retail offer by preventing a proliferation of uses which are not conducive to maintaining the vitality and viability of the Town Centre. Defining frontage lengths and classifying appropriate uses in frontages provide opportunities to regenerate and improve certain parts of the Town Centre and protect retail provision in others.

15.32 This policy supports Main Town Centre Uses, including commercial, leisure, evening and night-time uses in secondary frontages.

Implementation

15.33 Where marketing of the unit is required to justify a non-A1 use in the primary frontage, it should be undertaken by a suitably competent person for at least twelve months. A planning statement must be submitted setting out how this marketing exercise has been undertaken.

- 15.34 Within secondary frontages, Main Town Centre Uses will be considered acceptable except for office development which is considered appropriate only on first floor levels and above. This is to prevent blank ground floor frontages in the Town Centre that could harm the vitality of the area. For proposals relating to evening and night time uses, Policy PR11 should also be taken into consideration.

PR8 Frontages in Neighbourhood Centres

Development in Neighbourhood Centre frontages, which falls in Use Classes A1, A2, A3, A4, A5, D1, D2, Sui Generis and C3, will be supported subject to the following criteria:

- (a) the development would not result in the loss of key facilities that act as anchors or catalysts which assist in retaining existing or attracting new operators in the Neighbourhood Centre such as supermarkets or public houses;
- (b) 60% or more of the overall frontage length would be retained in Use Class A1;
- (c) for Use Class C3, the development is on the first floor or above.

Justification

- 15.39 This policy seeks to support a wider range of services and facilities within Neighbourhood Centres for local residents. These Centres provide services, such as healthcare, places to eat and drink and financial services. It is important that Neighbourhood Centres continue to have a variety of uses to avoid underused frontages and spaces.

Implementation

- 15.40 The frontages are mapped in the Appendices. The definition of frontage length and the method by which frontage length will be calculated will be set out in the Council's Authority Monitoring Report (AMR).

- 3.2 The Glossary of the HLDP states that Main Town Centre Uses, referred to in Policy PR6, are:

- retail development; leisure and entertainment facilities
- more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls)
- offices
- culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)

- 3.3 Policy PR9 relates to Development in Hatches, but does not set requirements relating to frontage lengths of hatches. As such, no hatch frontages are designated in the HLDP.
- 3.4 The Town Centre primary and secondary retail frontages, referred to in Policy PR6, are detailed in a [Guidance Note](#) on the Council's website, which is a material consideration in the determining of planning applications.
- 3.5 The frontages are broadly the same as those designated in the former Adopted Replacement Harlow Local Plan (ARHLP), which was revoked upon the adoption of the HLDP. The main changes to the frontages were as follows:
- Extension of secondary frontage to include the frontages of:
 - the former Post Office building and associated building (in Post Office Walk);
 - 1 The Rows;
 - the full length of 37 Broad Walk (Redstone House) (previously only part of the length was included)
 - Alteration of 5 to 9 West Walk to become primary frontage instead of secondary frontage

Planning Guidance for the Town Centre

- 3.6 The Harlow Town Centre Masterplan Framework Supplementary Planning Document (SPD) provides guidance to inform the future planning and design of the town centre. The guidance is illustrated through indicative plans and diagrams which communicate the principles.
- 3.7 As an SPD, the Framework is a material consideration in the determination of planning applications. The Framework provides further guidance in respect of Policies RS2 and PR5 of the HLDP.

4. General Notes and Changes

Audits

- 4.1 The first on-site frontages audit for the initial version of the Retail Frontages Study was undertaken in 2001. Further audits, with subsequent Study updates, were carried out in 2002, 2003 and 2009.
- 4.2 Since 2013, audits and Study updates have been carried out annually. These were initially done in January each year but, since 2021, they have been undertaken in April instead. This lines up with the standard annual monitoring periods for the Harlow Local Development Plan (HLDP), which run from 1 April to 31 March. It also avoids recording the status of the frontage of any units which housed only temporary Christmas-related 'pop-up' uses.
- 4.3 An extraordinary biannual update for the town centre frontages was carried out in July 2017, to assist the commencement of work on town centre policies and guidance.
- 4.4 In 2020, an audit was carried out but the Study was not updated because the HLDP was still going through the Examination process. Data from the 2020 audit is, however, provided in the 2021 version of the Study.
- 4.5 In March 2020, the UK experienced national restrictions and a 'lockdown' due to the Covid-19 pandemic, which closed all 'non-essential' shops, as well as restaurants, pubs, bars, cafes and other uses. These closures lasted until Summer 2020, but further national restrictions saw closures again in November 2020 and most of the period from December 2020 to April 2021.
- 4.6 The first audit following the start of the pandemic took place in late April 2021, after national operating restrictions on 'non-essential' shops had been lifted. While most hospitality uses remained at least partially closed until later in the Spring and Summer of 2021, they were considered to still be in use for the purpose of the audit (unless it was clear that a unit had permanently closed).
- 4.7 A subsequent audit took place in April 2022 and the next audit is due in April 2023.

Frontage Lengths

- 4.8 The ***lengths of frontage***, rather than *number of units*, are analysed. Frontage lengths are a more useful indicator than number of units, as one large unit could occupy a long frontage length, whereas several smaller units could occupy a similar length.
- 4.9 The HLDP does not designate frontages for hatches because the policy relating to hatches does not set requirements for frontages. However, the

frontages of hatches with five or more main units, as designated in the revoked Adopted Replacement Harlow Local Plan (2006), will continue to be monitored as part of this annual Study for effective monitoring.

- 4.10 Hatches of fewer than five main units did not have designated frontages in the ARHLP. However, the uses of the main units of these hatches are recorded as part of this Study. See the Appendices for maps which show the uses of such units in the current year.

Inactive Frontage (Vacant and Redevelopment)

- 4.11 In the Study data, frontage of units which is 'inactive' due to being redeveloped or refurbished is classified as "Redevelopment". This is to separate it from frontage which is vacant simply due to the unit being unoccupied (such frontage is classed as "Vacant").
- 4.12 A total figure for Vacant and Redevelopment frontage is supplied for each year in each frontage type. These are also split to detail the last known use. For example, frontage of a unit which was last in Sui Generis use would be classified as "V-SG", while 'Redevelopment' frontage last in E(a) use would be classified as "R-E(a)".

Uses and Changes to the Use Classes Order

- 4.13 Chapter 2 provides background information on national legislation which relates to retail frontages.
- 4.14 In 2015, various national changes to the Use Classes Order (UCO) came into force which meant bookmakers were reclassified as Sui Generis instead of A2. This change is, therefore, reflected in the Retail Frontages Study data from 2015 onwards.
- 4.15 As mentioned previously, in September 2020 further national changes to the Use Classes Order (UCO) came into force which had an impact on this Study. The changes are detailed in Fig. 4.1.

Fig. 4.1: Changes to the Use Class Order

Former Use Class	Current Use Class (from September 2020)
A1	E(a)
A2	E(c)
A3	E(b)
A3/A5*	E(b)
A4	Sui Generis
A5	Sui Generis
D1**	E(e to f); F1
D2**	E(d); F2(c to d); Sui Generis (cinemas, concert halls, bingo halls and dance halls)



* Frontage of units which have a majority restaurant use but also have a notable takeaway use, such as McDonald's, were referred to as A3/A5. Given that A5 is now part of the wide-ranging Sui Generis class, any A3/A5 uses are referred to in the data findings from 2021 onwards as "E(b)".

** For succinctness, any D1 or D2 uses are referred to in the data findings from 2021 onwards as "E/F", with the exception of cinemas, concert halls, bingo halls and dance halls which are referred to as "Sui Generis".

- 4.16 The changes made in September 2020 are reflected in frontage audit data from 2021 onwards. Where relevant in the Study, both the current and former Use Classes are displayed.

5. Findings: Town Centre Primary Frontages

Fig. 5.a: Town centre primary frontage: Use Class proportions, 2001 to 2022

Use Class <small>[where relevant, former Class is listed in square brackets]</small>	2001 	2002 	2003	2009	2013	2014	2015	2016	2017	2017 (2)	2018	2019	2020	2021	2022
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
E(a) [A1]	83.4	83.0	77.6	71.1	74.2	74.5	70.0	64.6	60.2	59.5	65.7	57.7	59.8	61.6	56.2
E(c) [A2]	3.4	3.7	3.7	3.1	4.2	4.0	4.1	3.6	4.3	4.3	4.9	4.9	4.8	4.3	5.4
E(b) [A3]	1.8	1.8	1.6	3.6	3.9	4.4	4.9	5.5	7.0	6.8	9.0	9.0	7.7	10.3	12.6
A3/A5 (revoked)	3.3	3.3	2.9	2.9	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1		
A4 (revoked)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
A5 (revoked)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
Sui Generis	0.0	0.0	0.3	0.3	1.0	1.0	0.5	0.8	0.7	0.7	1.0	1.0	1.0	2.5	2.3
Misc. Total	8.1	8.1	7.3	7.8	6.0	6.0	5.3	5.3	6.6	6.8	6.8	6.8	6.8	6.5	2.6
Misc. Split by Use															
E(g) [B1]	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.3	0.3	0.3	0.3	0.7	0.7
E/F [D1/D2]	6.0	6.0	5.4	5.3	3.9	3.9	4.1	4.1	5.2	5.2	5.2	5.2	5.2	4.5	0.6
Other	1.9	1.9	1.7	2.3	2.0	2.0	1.1	1.1	1.3	1.3	1.3	1.3	1.3	1.3	1.3
Vacant Total	0.0	0.0	6.6	11.2	8.5	8.0	2.8	7.9	9.9	10.5	4.5	12.4	11.7	8.7	11.0
Vacant Split by Use															
V-E(a) [V-A1]	0.0	0.0	2.1	6.4	5.4	5.5	2.3	7.1	8.8	9.4	2.9	11.1	9.1	6.1	8.5
V-E(c) [V-A2]	0.0	0.0	0.0	0.9	0.7	0.5	0.5	0.5	0.5	0.5	0.5	0.2	0.4	0.9	0.0
V-E(b) [V-A3]	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.9	1.7
V-Unknown	0.0	0.0	4.4	3.9	2.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-Sui Generis	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.6	0.6	0.3	0.3	0.0	0.0	0.0
V-N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.8
Redev. Total	0.0	0.0	0.0	0.0	0.0	0.0	10.4	10.1	9.0	9.3	6.1	6.1	6.1	6.0	9.9
Redev. Split by Use															
R-E(a) [R-A1]	0.0	0.0	0.0	0.0	0.0	0.0	6.6	6.3	4.9	5.2	4.5	4.5	4.5	4.5	4.5
R-E(c) [R-A2]	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
R-E(b) [R-A3]	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
R-Sui Generis	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.4
R-Unknown	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.0	2.7	2.7	0.2	0.2	0.2	0.2	0.2
R-Other	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.8	0.5	0.5	0.5	0.5	0.5	0.5	4.4

 Approx. 20% of the town centre primary frontage was not recorded in 2001 & 2002, so data for these years is of limited use.

Fig. 5.b: Town centre primary frontage: Use Class proportions, 2001 to 2022

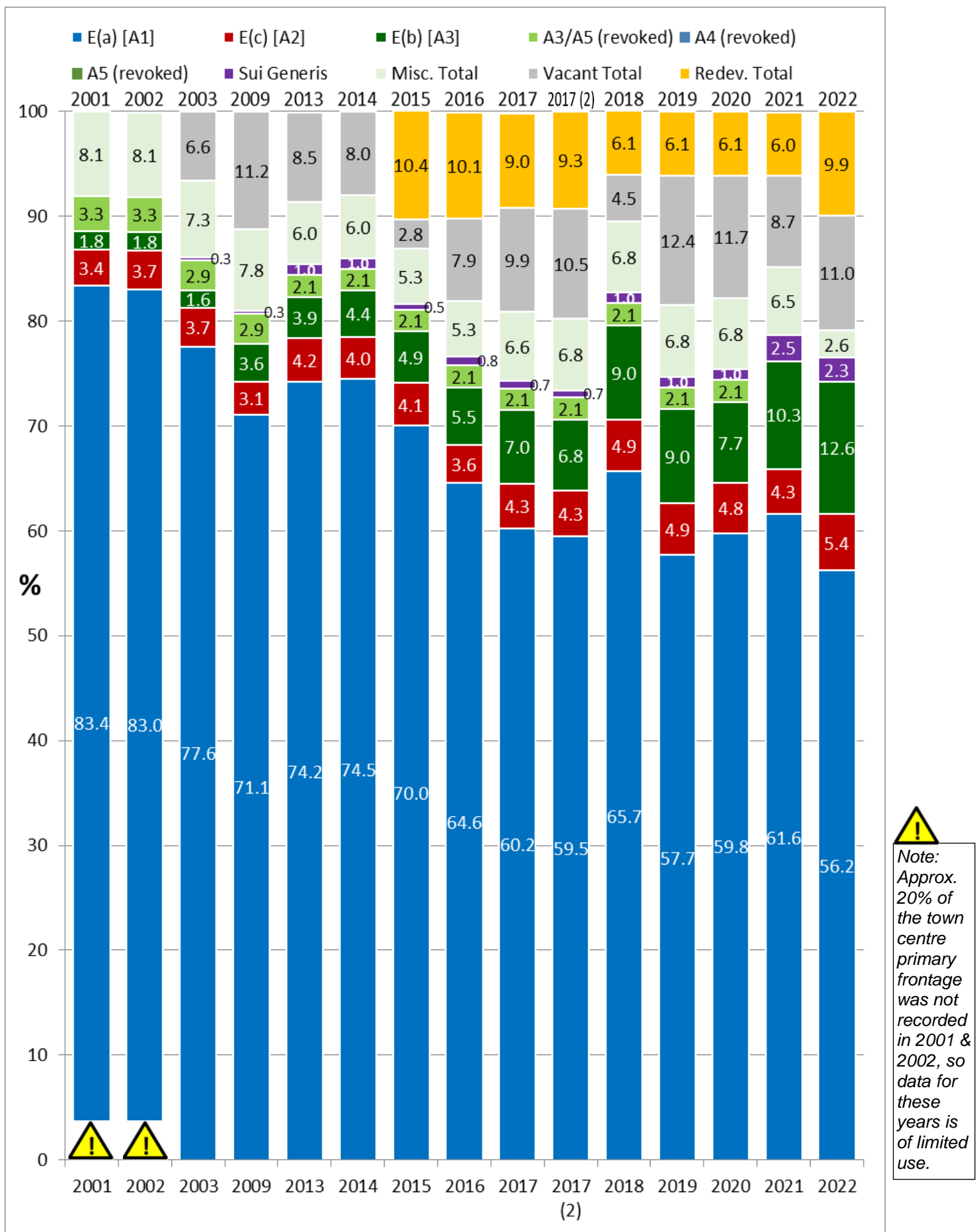


Fig. 5.c: Summary of changes to town centre primary frontage Use Class proportions, 2003 to 2022

2003 to 2009	2009 to 2013	2013 to 2021	2021 to 2022
A3 +2%	A1 +3.1%	E(b) [A3] +6.4% ¹	E(b) +2.3%
Misc. +0.5%	A2 +1.1%	SG +1.5% ²	E(c) +1.1%
A2 -0.6%	SG +0.7%	Misc. +0.5%	SG -0.2%
A1 -6.5%	A3 +0.3%	E(c) [A2] +0.1%	Misc. -3.9%
	A3/A5 -0.8%	E(a) [A1] -12.6%	E(a) -5.4%
	Misc. -1.8%		
Vacant +4.6% to 11.2%	Vacant -2.7% to 8.5%	Vacant +0.2% to 8.7%	Vacant +2.3% to 11%
Redev. 0%	Redev. 0%	Redev. +6% to 6%	Redev. +3.9% to 9.9%

Footnotes (refer to Chapters 3 & 4 for more information)

¹ Most of this increase due to A3/A5 frontage which was reclassified as E(b) following UCO changes. Otherwise, E(b) would have actually seen a small drop.

² Increase partly due to (i.) secondary frontage being redesignated as primary frontage, and (ii.) a cinema being reclassified as Sui Generis following the UCO changes.

A3/5, A4 and A5 not shown from '2013 to 2021' onwards due to these uses being revoked and reclassified following UCO changes in 2020.

Total recorded primary frontage length:

1,634m (2001-2) } reason for increases between 2001-9 is not known, but

1,818m (2003) } is likely to be due to frontage being recorded which had

1,854m (2009) } previously not been recorded

2,520m (2013-2020) – increased in 2013 due to addition of the Water Gardens shopping area in the primary frontage

2,536m (2021-) – increased in 2021 due to minor additions to the primary frontage (see Chapter 3 for more information)

Commentary

- 5.1 The increase in the proportion of vacant frontage between 2003 and 2009 reflected the nationwide impact of the global recession on the retail industry. Between 2009 and 2013, it is evident that a slow recovery from the recession had begun, with the proportion of vacant frontage reducing.
- 5.2 The closure of stores such as BHS, Argos and the Post Office in Harlow since the mid-2010s reflects national trends where such businesses have closed all (or some) stores across the UK. In some cases, such as the Post Office and Argos, a number of stores have closed in favour of reopening as part of a larger shop.
- 5.3 Amended permitted development rights introduced in the 2010s have allowed greater flexibility of changes-of-use for retail units. These rights


have had a relatively low impact on the town centre primary frontage. E(a) use has, therefore, remained the most prominent.

- 5.4 Since 2015, a number of units have closed for redevelopment, such as Little Walk. This redevelopment signalled the start of further investment and regeneration in the town centre.
- 5.5 At the start of 2015, the proportion of vacant frontage fell to 3%, the lowest level for over a decade, partly because of the high proportion of previously vacant frontage which had started to be redeveloped and reoccupied.
- 5.6 The large Marks & Spencer store in Broad Walk closed by the start of 2016, meaning the proportion of vacant frontage increased to 7.9%. Most of this store was, however, in use again by the start of 2017 following reconfiguration and redevelopment of the unit.
- 5.7 In Summer 2016, the large BHS unit in the Harvey Centre closed. This had an impact on the proportion of vacant frontage in 2017, but the reopening of other vacant units negated the closure of BHS to an extent.
- 5.8 Since then, there have been a number of temporary uses in the BHS unit which have been recorded by the Retail Frontages Study. For example, in 2018 the unit was in E(a) [formerly A1] use but was vacant again by 2019. The impact of the vacancy of this large unit is clear – excluding it from the data means the proportion of vacant frontage recorded in 2019, for example, would be nearer 7% rather than just over 12%.
- 5.9 New units resulting from the redevelopment of the first floor of the Harvey Centre started to be occupied at the end of 2016, which included the opening of a new cinema. This resulted in an increase in the proportion of E(b) [formerly A3] frontage.
- 5.10 Whilst some previously vacant frontage became in use again between 2018 and 2019, other units became vacant, including the Harvey Centre units previously occupied by Argos and Blue Inc., which have long frontages and a more notable impact on the data.
- 5.11 Along with the BHS unit becoming vacant again, the proportion of vacant frontage at the start of 2019 rose, while the proportion of E(a) frontage dropped to levels not experienced for over 18 years. The proportion of E(a) frontage is expected to increase, however, once the town centre units undergoing redevelopment are reoccupied in the coming years.
- 5.12 Between 2019 and 2020, there was little change experienced aside from a small increase in the proportion of E(a) frontage, along with small decreases in proportions of E(b) and vacant frontage.

- 5.13 Despite the Covid-19 pandemic and resulting national restrictions on retail and hospitality between Spring 2020 and Spring 2021, there was not a notable change experienced in the primary frontage between 2020 and 2021.
- 5.14 Most of the changes, such as the proportion of E(g) [formerly B1], E(b) and Sui Generis frontage increasing, are due to the UCO changes and the way uses are recorded.
- 5.15 There was a small rise in E(a) frontage and reduction in vacant frontage, but this is mostly explained by the large former BHS unit returning into use (albeit possibly a temporary use).
- 5.16 Between 2021 and 2022, the most notable change was the reduction of E(a) frontage by 5.4%. This is, however, largely explained by the former BHS unit becoming vacant again.
- 5.17 Despite this loss of E(a) frontage, the proportion of vacant frontage only rose by 2.3%, due to a number of vacant units coming back into use. Some of these became E(b) and E(c) uses, which explains the proportional rise in these use frontages.
- 5.18 The reduction in 'Misc.' frontage and rise in 'Redevelopment' frontage was due to the Central Library undergoing redevelopment.
- 5.19 Fig. 5.b clearly demonstrates that the decline in the proportion of E(a) frontage experienced between 2001 and 2017 had started to reverse in 2018, but then levelled out. In contrast, the proportion of E(b) frontage has steadily increased since overall since 2001. The proportion of frontage in other uses has remained relatively stable, although 'Misc.' frontage has slowly reduced over the years.
- 5.20 As of 2022, 20.9% of the overall frontage is 'inactive'; 11% due to being vacant and 9.9% due to the units being refurbished or redeveloped.
- 5.21 The proportion of 'inactive' frontage (comprising vacant and 'redevelopment' frontage) reached a peak in 2022, largely due to the combined effect of the Central Library being closed for redevelopment and the former BHS unit becoming vacant again. The proportion of vacant frontage has remained relatively stable in recent years.
- 5.22 The overall proportion of 'inactive' frontage is expected to continue to decline in coming years due to continued regeneration in the town centre.

6. Findings: Town Centre Secondary Frontages

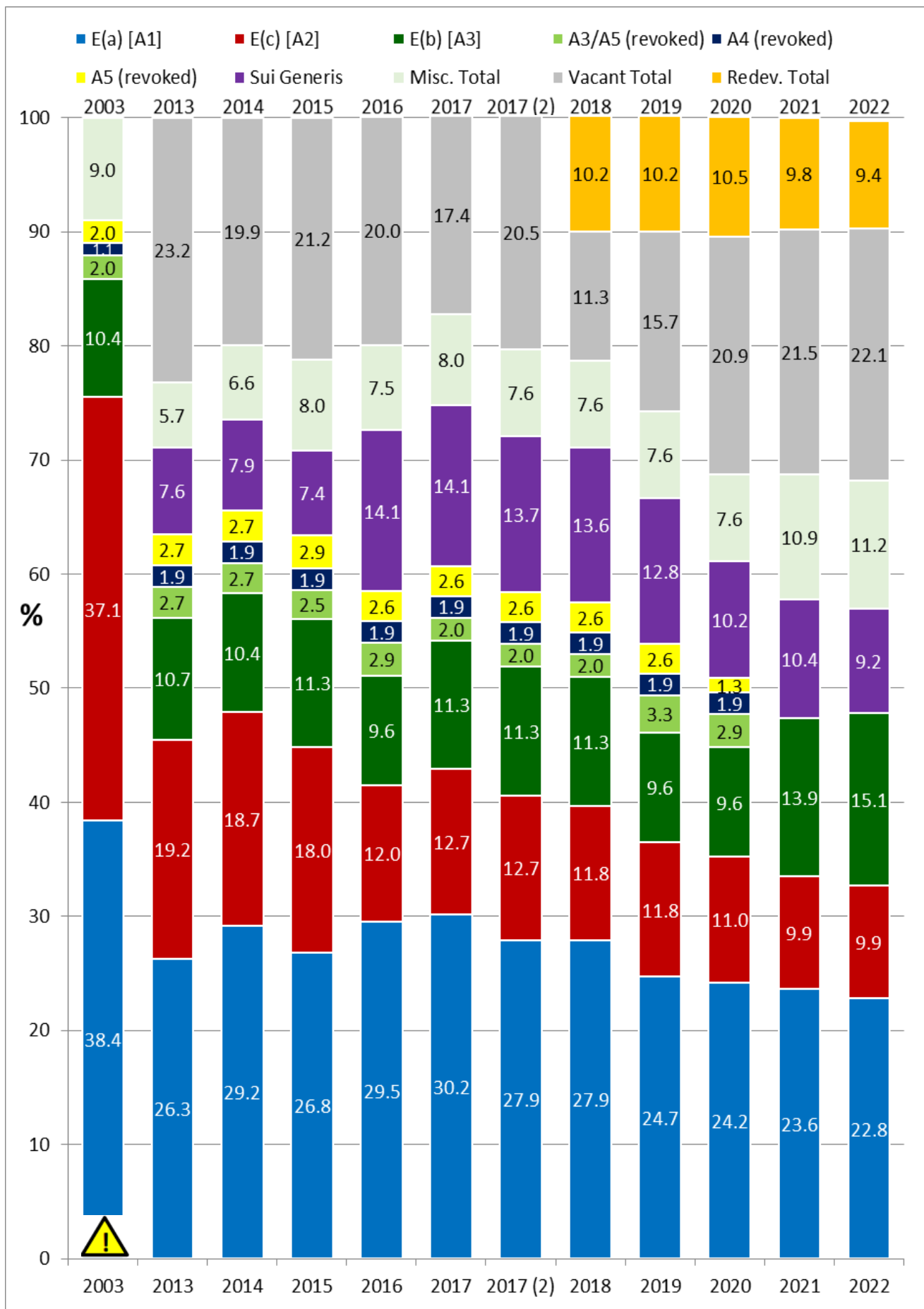
Fig. 6.a: Town centre secondary frontage: Use Class proportions, 2003 to 2022

Use Class <small>[where relevant, former Class is listed in square brackets]</small>	2003 	2013	2014	2015	2016	2017	2017 (2)	2018	2019	2020	2021	2022
	%	%	%	%	%	%	%	%	%	%	%	%
E(a) [A1]	38.4	26.3	29.2	26.8	29.5	30.2	27.9	27.9	24.7	24.2	23.6	22.8
E(c) [A2]	37.1	19.2	18.7	18.0	12.0	12.7	12.7	11.8	11.8	11.0	9.9	9.9
E(b) [A3]	10.4	10.7	10.4	11.3	9.6	11.3	11.3	11.3	9.6	9.6	13.9	15.1
A3/A5 (revoked)	2.0	2.7	2.7	2.5	2.9	2.0	2.0	2.0	3.3	2.9		
A4 (revoked)	1.1	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9		
A5 (revoked)	2.0	2.7	2.7	2.9	2.6	2.6	2.6	2.6	2.6	1.3		
Sui Generis	0.0	7.6	7.9	7.4	14.1	14.1	13.7	13.6	12.8	10.2	10.4	9.2
Misc. Total	9.0	5.7	6.6	8.0	7.5	8.0	7.6	7.6	7.6	7.6	10.9	11.2
Misc. Split by Use												
E(g) [B1]	1.1	0.5	1.4	3.3	3.3	3.3	2.9	2.9	2.9	2.9	2.6	2.6
B8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4
E/F [D1/D2]	2.3	1.3	1.3	0.9	0.4	0.9	0.9	0.9	0.9	0.9	0.8	1.1
C3	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other	5.3	3.7	3.7	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.9	3.9
Vacant Total	0.0	23.2	19.9	21.2	20.0	17.4	20.5	11.3	15.7	20.9	21.5	22.1
Vacant Split by Use												
V-E(a) [V-A1]	0.0	3.2	2.8	4.8	4.6	3.5	6.3	5.0	10.4	10.5	11.2	12.4
V-E(c) [V-A2]	0.0	14.0	13.0	13.1	12.2	12.2	12.2	4.7	2.5	3.3	1.3	0.9
V-E(b) [V-A3]	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.8	1.1
V-A3/A5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4		
V-A5	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.4	1.7		
V-E(g) [V-B1]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	1.7
V-D1/D2 [V-E/F]	0.0	3.7	2.4	2.3	2.8	1.2	1.2	1.2	1.2	1.2	0.0	0.0
V-Sui Generis	0.0	1.4	1.4	0.6	0.0	0.0	0.0	0.0	0.8	3.9	6.5	6.0
V-Unknown	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-Other	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Redev. Total	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.2	10.2	10.5	9.8	9.4
Redev. Split by Use												
R-E(a) [R-A1]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.3	1.3	1.2	1.2
R-E(c) [R-A2]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.5	8.5	8.5	7.8	7.8
R-A3/A5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3		
R-E(g) [R-B1]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4
R-Sui Generis	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0



Approx. 25% of the town centre secondary frontage was not recorded in 2003, so data for this year is of limited use.

Fig. 6.b: Town centre secondary frontage: Use Class proportions, 2003 to 2022



Note: Approx. 25% of the town centre secondary frontage was not recorded in 2003, so data for this year is of limited use.

Fig. 6.c: Summary of changes to town centre secondary frontages Use Class proportions, 2003 to 2022

2003 to 2013	2013 to 2021	2021 to 2022
SG +7.6%	Misc. +5.2% ³	E(b) +1.2%
A4 +0.8%	E(b) [A3] +3.2% ²	Misc. +0.3%
A3/A5 +0.7%	SG +2.8% ¹	E(a) -0.8%
A5 +0.7%	E(a) [A1] -2.7%	SG -1.2%
A3 +0.3%	E(c) [A2] -9.3% ¹	
Misc. -3.3%		
A1 -12.1%		
A2 -17.9%		
Vacant +23.2% ⁴ to 23.2%	Vacant -1.7% to 21.5%	Vacant +0.6% to 22.1%
Redev. 0%	Redev. +9.8% to 9.8%	Redev. -0.4% to 9.4%

Footnotes (refer to Chapters 3 & 4 for more information)

¹ Most of A2 reduction and SG increase due to UCO change.

² Most of increase due to (i.) A3/A5 frontages being reclassified as E(b) following UCO changes, and (ii.) the addition of new secondary frontage.

³ Most of increase due to the addition of new secondary frontage.

⁴ Apparent large rise in vacant frontage is due to 0% being recorded in 2003. However, a quarter of all secondary frontage was not recorded that year, so it is possible there was vacant frontage then which was unrecorded.

A3/5, A4 and A5 not shown from '2013 to 2021' onwards due to these uses being revoked and reclassified following UCO changes in 2020.

Total recorded secondary frontage length:

984m (2003) } reason for increases is due to frontages

1,396m (2013-14) } being recorded which had previously

1,452m (2015-2020) } not been recorded

1,572m (2021-) – increased in 2021 due to minor additions to the secondary frontages (see Chapter 3 for more information)

Commentary

- 6.1 There is little value in comparing 2003 with later years because a quarter of frontage in that year was not recorded.
- 6.2 New permitted developments were introduced in 2013 which allowed greater flexibility of changes-of-use for retail units. These rights had little impact on the frontages because the proportions of uses have remained relatively stable since, with E(a) [formerly A1] use remaining the most prominent.

- 6.3 Considering that much of the change from E(c) [formerly A2] to Sui Generis between 2013 and 2018 was due to the national reclassifying of bookmakers in 2015, there was little actual change experienced between use classes during this period.
- 6.4 During this period there was a decrease in the proportion of vacant frontage, due to units coming back into use and also some starting to undergo redevelopment.
- 6.5 There was, however, an increase in the proportion of vacant frontage between 2018 and 2019, rising by just over 4%. Some units previously vacant at the start of 2018 came back into use, but this was negated by the closure of the large units previously occupied by a Polish supermarket in West Gate and the BHF charity shop on the corner of Terminus Street. The rise in proportion of vacant frontage continued, increasing by another 5% between 2019 and 2020.
- 6.6 Despite the Covid-19 pandemic and resulting national restrictions on retail and hospitality between Spring 2020 and Spring 2021, there was not a notable change experienced in the secondary frontages between 2020 and 2021. Most of the changes which were experienced were due to the UCO changes and the way uses are recorded.
- 6.7 Between 2021 and 2022, there was little recorded change. However, the proportion of vacant frontage increased by 0.6% to 22.1%, which is the highest recorded since 2013 and the second highest overall.
- 6.8 In 2022, the overall frontage which could be classed as 'inactive' stood at 31.5%; 22.1% due to being vacant and 9.4% due to being refurbished or redeveloped. This level is the highest recorded, but is expected to reduce in the near future due to regeneration in the town centre.
- 6.9 Fig. 6.b clearly shows that, since 2013, the proportion of E(a) frontage has remained relatively stable. E(b) frontage was stable but has started to increase in more recent years (although some of this is due to the UCO changes), while E(c) has slowly decreased.
- 6.10 Sui Generis was increasing but has more recently been declining. Frontages classed as 'misc.', which include uses such as offices and educational uses, have been increasing in recent years following a period of stability.

7. Findings: Neighbourhood Centre Frontages

Fig. 7.a: Neighbourhood centre frontages: Use Class proportions, 2001 to 2022

Use Class <small>[where relevant, former Class is listed in square brackets]</small>	2001	2002	2003	2009	2013	2015	2016	2017	2018	2019	2020	2021	2022
	%	%	%	%	%	%	%	%	%	%	%	%	%
E(a) [A1]	65.1	61.4	61.4	56.5	58.5	58.4	60.9	62.6	61.5	61.5	58.8	58.8	59.4
E(c) [A2]	11.2	11.2	10.6	12.2	12.7	9.4	5.2	4.6	4.2	4.2	3.6	3.6	3.7
E(b) [A3]	9.3	13.0	10.2	10.7	10.2	11.6	11.1	10.5	10.3	10.9	12.0	14.9	15.7
A3/A5 (revoked)	1.2	1.2	1.2	1.7	3.5	1.7	1.7	2.9	3.0	2.4	1.8		
A4 (revoked)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
A5 (revoked)	1.2	1.2	1.1	1.7	1.1	2.9	3.4	2.2	3.3	3.4	3.9		
Sui Generis	1.2	1.2	1.7	2.3	2.8	2.8	5.8	5.8	6.5	6.5	6.5	10.4	9.4
Misc. Total	10.8	10.8	9.8	10.5	8.5	9.5	9.0	9.0	10.1	10.1	11.2	11.2	11.1
Misc. Split by Use													
E(g) [B1]	2.9	2.9	2.3	2.3	0.3	0.8	0.3	0.3	1.4	1.4	2.4	2.4	2.0
E/F [D1/D2]	1.3	1.3	1.2	1.9	1.9	2.4	2.4	2.4	2.4	2.4	2.4	2.4	3.9
C3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other	6.4	6.4	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	5.0
Vacant Total	0.0	0.0	4.0	4.5	2.9	2.3	2.8	2.4	1.0	1.0	2.2	1.1	0.9
Vacant Split by Use													
V-E(a) [V-A1]	0.0	0.0	1.6	4.5	1.7	1.7	1.1	0.6	0.6	0.6	2.2	1.1	0.9
V-E(c) [V-A2]	0.0	0.0	1.1	0.0	0.6	0.6	1.7	1.2	0.4	0.4	0.0	0.0	0.0
V-E(b) [V-A3]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0
V-A5	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0		
V-Unknown	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-Sui Generis	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redev. Total	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redev. Split by Use													
R-E(a) [R-A1]	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Fig. 7.b: Neighbourhood centre frontages: Use Class proportions, 2001 to 2022

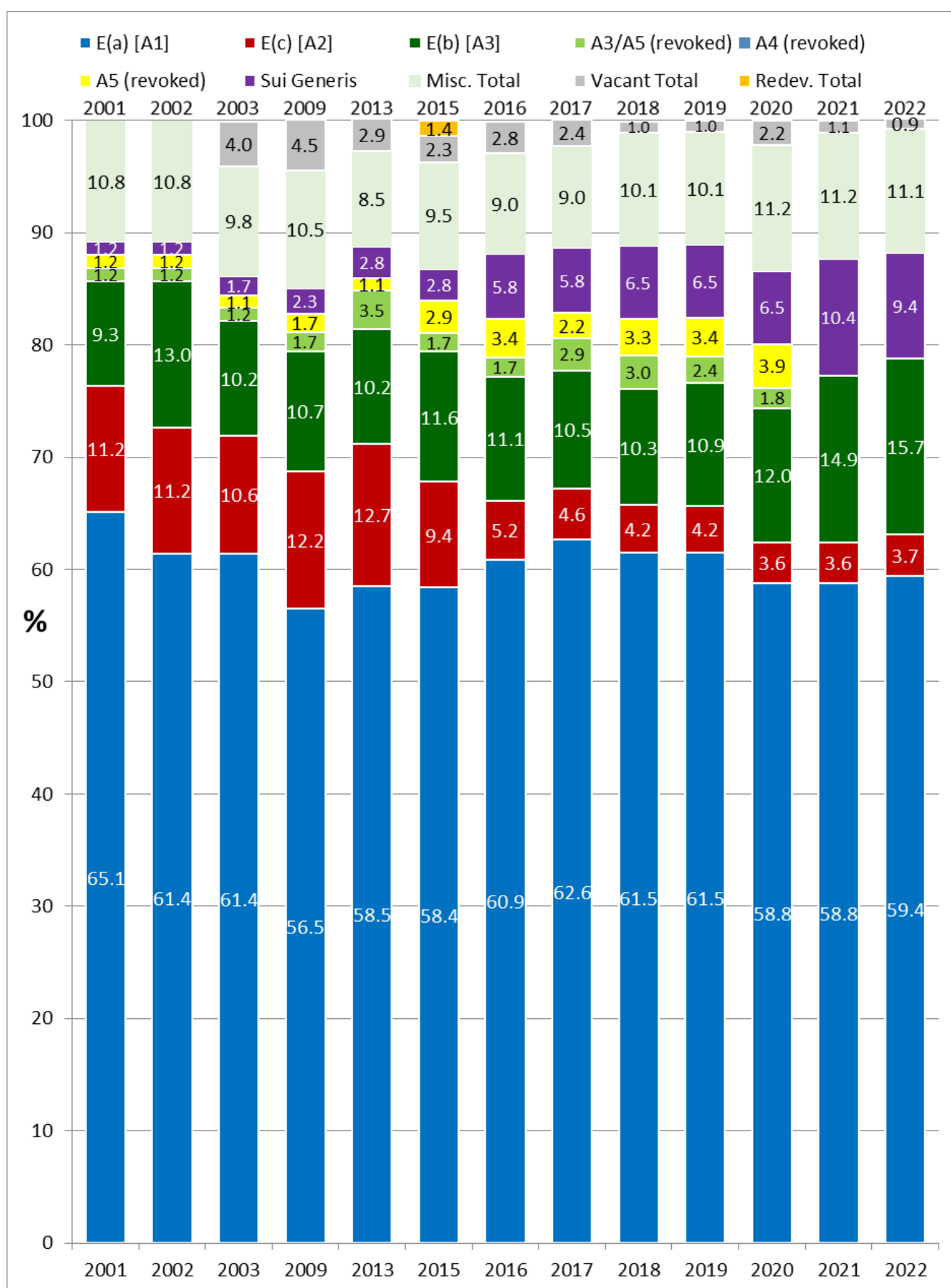


Fig. 7.c: Summary of changes to neighbourhood centre frontages, 2003 to 2022

2003 to 2009	2009 to 2013	2013 to 2021	2021 to 2022
A2 +1.6%	A1 +2%	SG +7.6% ¹	E(b) +0.8%
Misc. +0.7%	A3/A5 +1.8%	E(b) [A3] +4.7% ²	E(a) +0.6%
A5 +0.6%	A2 +0.5%	Misc. +2.7%	E(c) +0.1%
SG +0.6%	SG +0.5%	E(a) [A1] +0.3%	Misc. -0.1%
A3 +0.5%	A3 -0.6%	E(c) [A2] -9.1% ¹	SG -1%
A3/A5 +0.5%	A5 -0.6%		
A1 -4.9%	Misc. -2%		
Vacant +0.5% to 4.5%	Vacant -1.6% to 2.9%	Vacant -1.8% to 1.1%	Vacant -0.2% to 0.9%
Redev. 0%	Redev. 0%	Redev. 0%	Redev. 0%

Footnotes (refer to Chapters 3 & 4 for more information)

¹ Most of A2 reduction and SG increase due to UCO change.

² Increase mostly due to A3/A5 frontages being reclassified as E(b) following UCO changes.

³ Increase mostly due to A5 frontages being reclassified as SG following UCO changes.

A3/5, A4 and A5 not shown from '2013 to 2021' onwards due to these uses being revoked and reclassified following UCO changes in 2020.

Total recorded neighbourhood centre frontage length:

963m (2001-2) } reason for increases is

999m (203) } due to frontages being recorded which had

1,002m (2009-) } previously not been recorded

Commentary

- 7.1 The neighbourhood centres have consistently performed well – even during the period of the global recession in the late 2000s – maintaining a very low proportion of vacant frontage.
- 7.2 Their robustness throughout this period reflects their importance to local residents. The original design of the town by Sir Frederick Gibberd, who was the New Town's masterplanner, ensured that neighbourhood centres were easy to access for most residents and often within walking distance.
- 7.3 The proportions of frontage uses have remained fairly constant; around half being in E(a) [formerly A1] use, with notable amounts of E(b) [formerly A3] frontage. However, there has been a decline in the proportion of E(c) [formerly A2] frontage. Conversely, the proportion of Sui Generis frontage has risen. Both these trends have, however, levelled off in recent years.
- 7.4 New permitted developments were introduced in 2013 which allow greater flexibility of changes-of-use for retail units. These permitted development rights appear to have had little impact on the neighbourhood centre frontages.

- 7.5 During the Covid-19 pandemic and resulting national restrictions on retail between Spring 2020 and Spring 2021, neighbourhood centres and hatches would have proved important to many residents who were avoiding travelling far for their routine shopping.
- 7.6 There was not a notable change experienced in the frontages between 2021 and 2022.
- 7.7 As of 2022, just 0.9% of the overall frontage is vacant, which is the lowest vacancy level recorded for 20 years.

8. Findings: Hatch Frontages

- 8.1 The Harlow Local Development Plan, adopted in 2020, does not designate frontages for hatches because the policy relating to hatches does not set requirements for frontages. However, hatches with greater than five units, as designated in the revoked ARHLP, will continue to be monitored as part of this annual Study for effective monitoring.
- 8.2 Hatches with fewer than five units did not have designated frontages in the ARHLP. However, the uses of the main units of these hatches are recorded as part of this Study. See the Appendices for maps which show the uses of such units in the most recent year.

Fig. 8.a: Hatch frontages: Use Class proportions, 2001 to 2022

Use Class [where relevant, former Class is listed in square brackets]	2001	2002	2003	2009	2013	2015	2016	2017	2018	2019	2020	2021	2022
	%	%	%	%	%	%	%	%	%	%	%	%	%
E(a) [A1]	61.2	61.2	61.2	52.9	52.9	52.9	52.9	48.1	48.3	51.4	51.4	51.4	51.4
E(c) [A2]	10.8	10.8	10.8	8.6	8.6	8.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
E(b) [A3]	10.3	10.3	10.3	15.7	15.7	15.7	15.7	15.7	15.7	17.4	17.4	17.4	17.3
A3/A5 (revoked)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0	0.0		
A4 (revoked)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
A5 (revoked)	14.7	14.7	14.7	14.7	14.7	14.7	14.7	14.7	14.7	14.7	14.7		
Sui Generis	0.0	0.0	0.0	0.0	1.7	1.7	10.3	11.8	11.8	11.8	10.0	24.8	23.1
Misc. Total	3.0	3.0	3.0	4.7	6.4	6.4	6.4	6.4	4.7	3.2	3.2	3.3	3.3
Misc. Split by Use													
E(g) [B1]	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7	1.8	1.7	1.7	1.8	1.8
E/F [D1/D2]	1.5	1.5	1.5	3.2	3.2	3.2	3.2	3.2	1.4	0.0	0.0	0.0	0.0
Other	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
Vacant Total	0.0	0.0	0.0	3.4	0.0	0.0	0.0	0.0	3.3	0.0	1.8	1.8	1.8
Vacant Split by Use													
V-E(a) [V-A1]	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-A3/A5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0		
V-E(g) [V-B1]	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
V-Sui Generis	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	1.8	1.8
Redev. Total	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5	1.5	1.5	3.2
Redev. Split by Use													
R-D1/D2 [R-E/F]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0

Fig. 8.b: Hatch frontages: Use Class proportions, 2001 to 2022

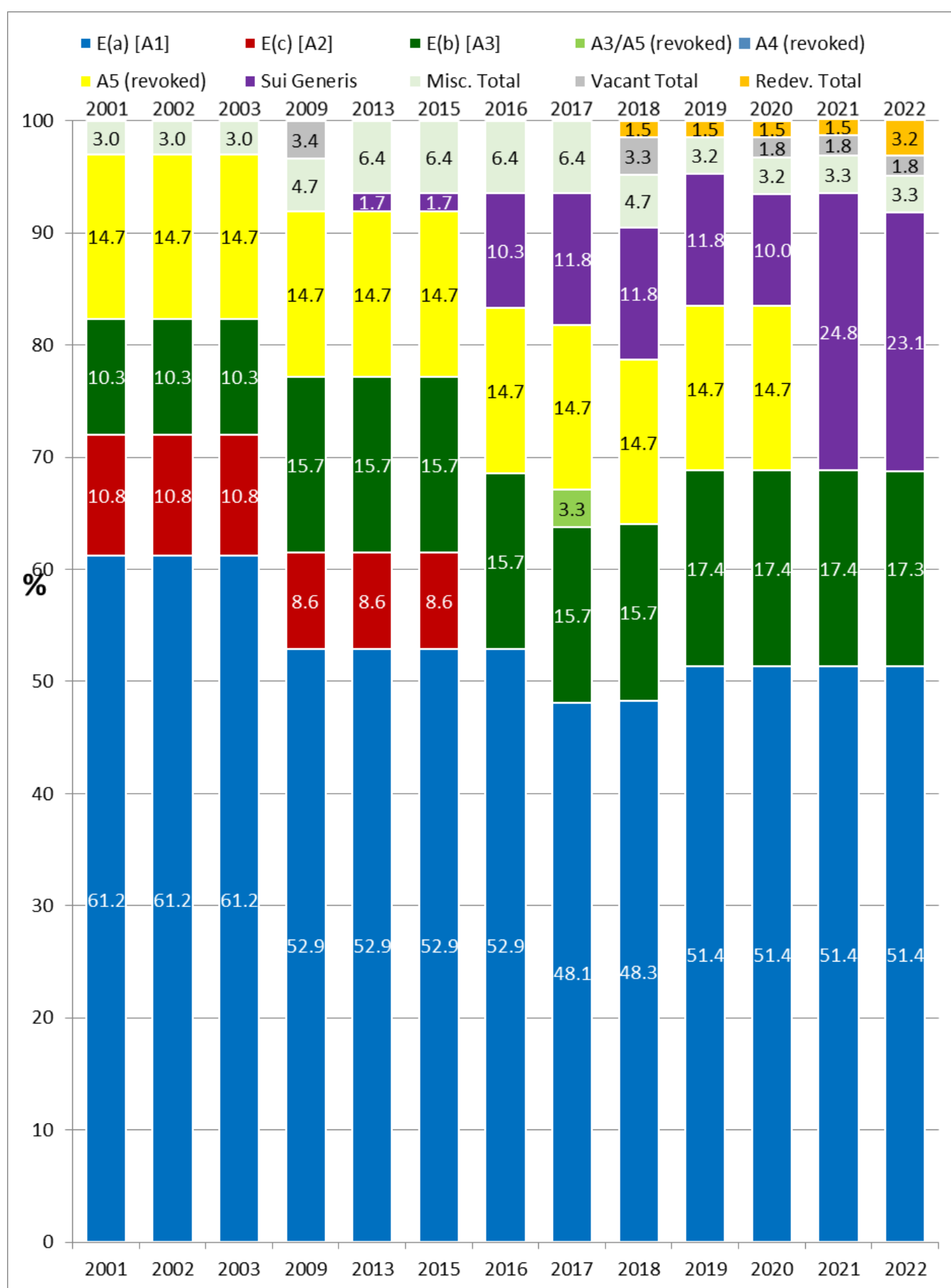


Fig. 8.c: Summary of changes to hatch frontage Use Class proportions, 2003 to 2022

2003 to 2009	2009 to 2013	2013 to 2021	2021 to 2022
A3 +5.4%	Misc. +1.7%	SG +23.1% ¹	SG -1.7%
Misc. +1.7%	SG +1.7%	E(b) [A3] +1.7%	E(b) -0.1%
A2 -2.2%		E(a) [A1] -1.5%	
A1 -8.3%		Misc. -3.1 %	
		E(c) [A2] -8.6% ¹	
Vacant +3.4% to 3.4%	Vacant -3.4% to 0%	Vacant +1.8% to 1.8%	Vacant No Change
Redev. 0%	Redev. 0%	Redev. +1.5% to 1.5%	Redev. +1.7% to 3.2%

Footnotes (refer to Chapters 3 & 4 for more information)

¹ Most of these changes due to the various UCO changes during this period.

A3/5, A4 and A5 not shown from '2013 to 2021' onwards due to these uses being revoked and reclassified following UCO changes in 2020.

Total recorded hatch frontage length: 295m

Commentary

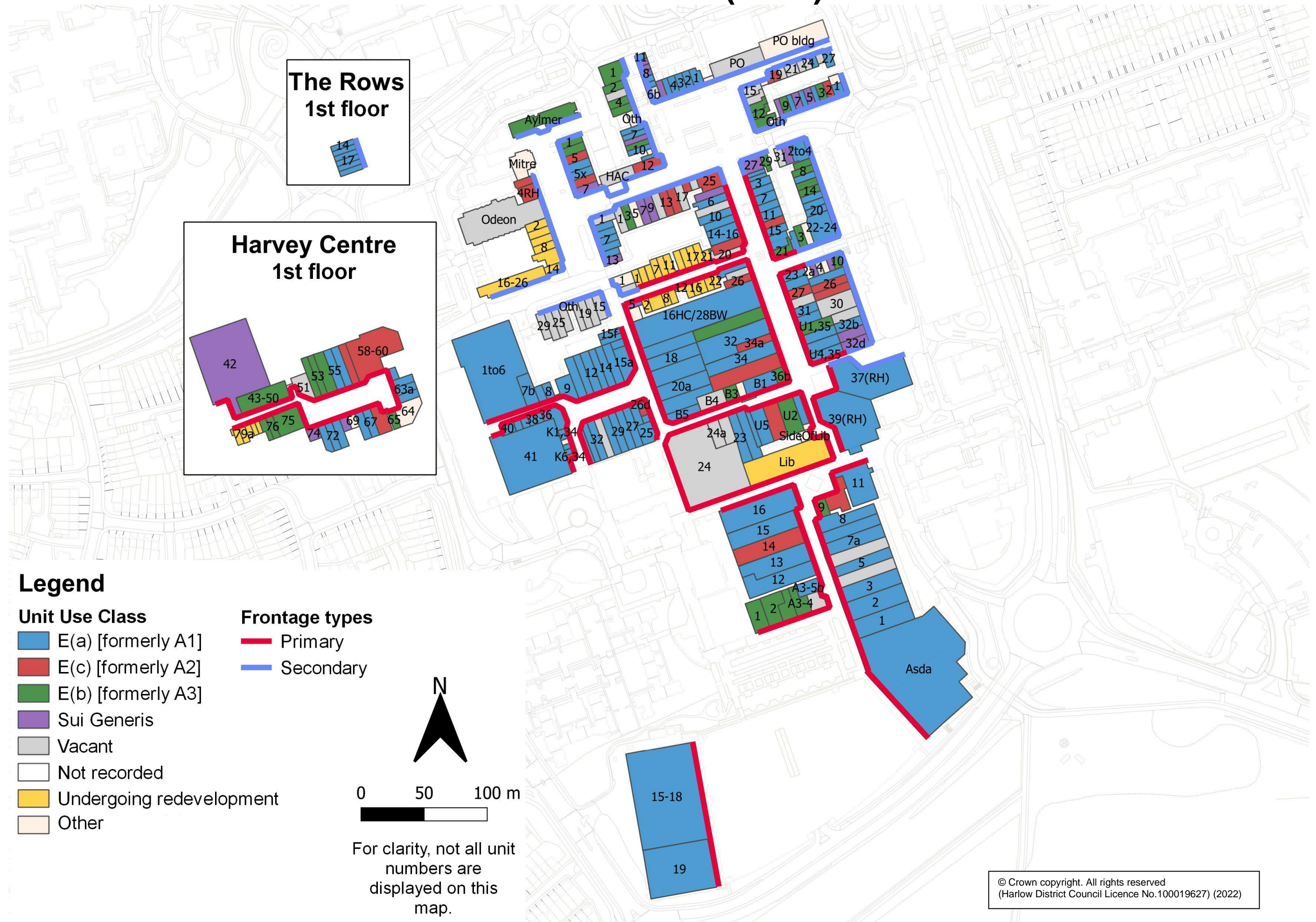
- 8.3 The hatches have consistently performed well, with very low rates of vacant frontage.
- 8.4 The proportions of frontage uses have remained fairly constant; around half being in E(a) use, with notable amounts of E(c), E(b) and Sui Generis uses.
- 8.5 New permitted developments were introduced in 2013 which allow greater flexibility of changes-of-use for retail units. These new permitted development rights appear to have had little impact on the hatch frontages.
- 8.6 Over the last 20 years the proportion of E(a) [formerly A1] frontage has declined and E(b) [formerly A3] has increased, though these have now levelled off. There was also an increase in Sui Generis frontage but this has also levelled off (the sudden increase in 2021 is explained above). E(c) [formerly A2] declined to an extent that, since 2016, there has been no E(c) frontage.
- 8.7 Between 2003 and 2009, there was a notable decrease in the proportion of E(a) frontage, as well as a small decrease in E(c) usage. The only usage proportion which increased was E(b).
- 8.8 Between 2009 and 2013, frontage which had become vacant between 2003 and 2009 was brought back into use as E(g) [formerly B1] and Sui Generis uses, resulting in no vacant frontage. In 2016, a notable increase in the proportion of Sui Generis frontage was experienced. This was offset by decreases in the proportions of E(a) and E(c) frontage.

- 8.8 During the Covid-19 pandemic and resulting national restrictions on retail between Spring 2020 and Spring 2021, neighbourhood centres and hatches would have proved important to many residents who were avoiding travelling far for their routine shopping.
- 8.9 The changes experienced between 2020 and 2021 were mostly due to the UCO changes and the way uses are recorded. There was not a notable change experienced in the frontages between 2021 and 2022, aside from a minor reduction in Sui Generis frontage and a resulting minor increase in frontage undergoing redevelopment.
- 8.10 As of 2022, 1.8% of the overall frontage is vacant and 3.2% is classed as undergoing redevelopment, meaning a total 'inactive' frontage proportion of 5%.

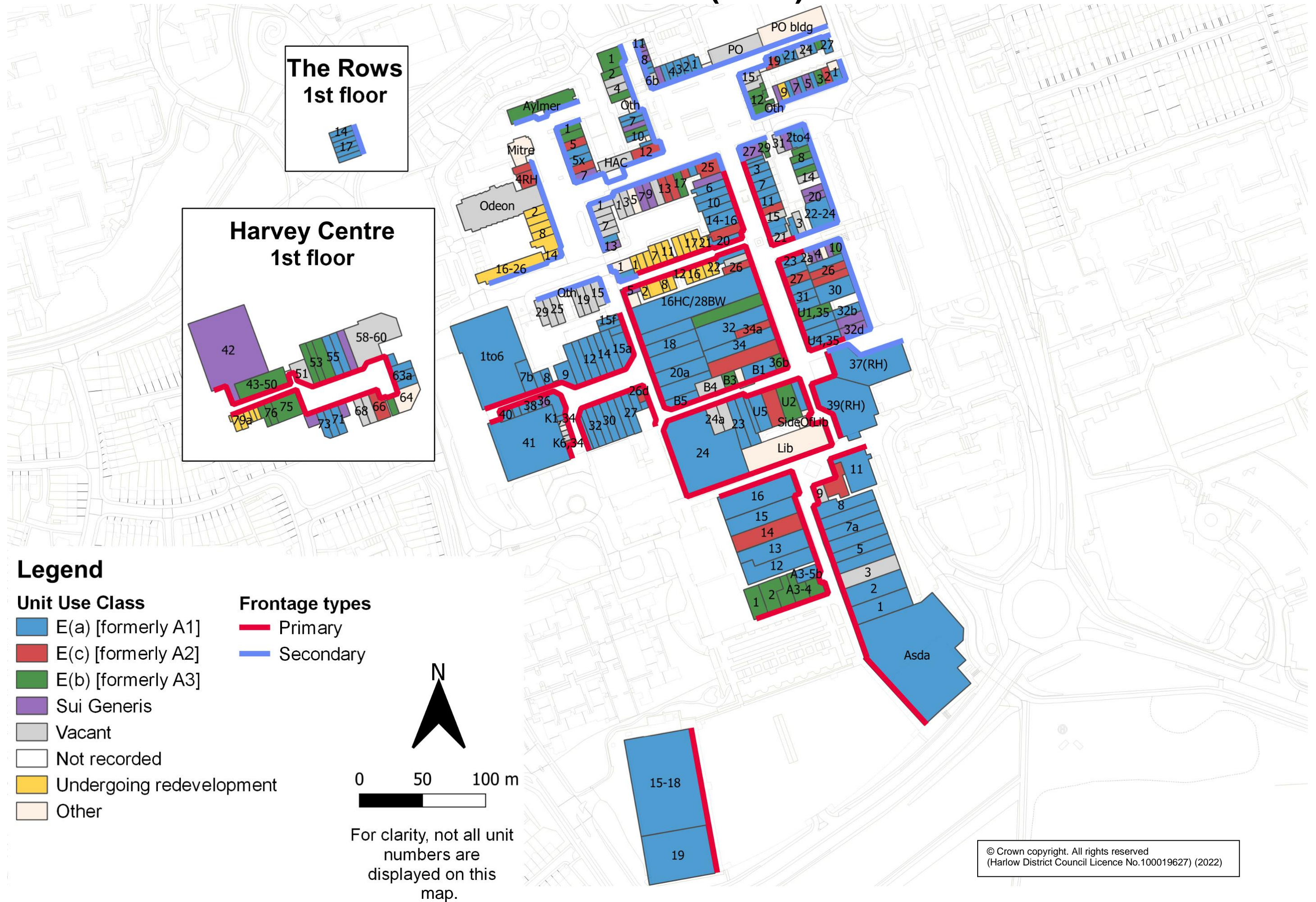
Appendix 1: Town Centre Maps

(2003—2022)

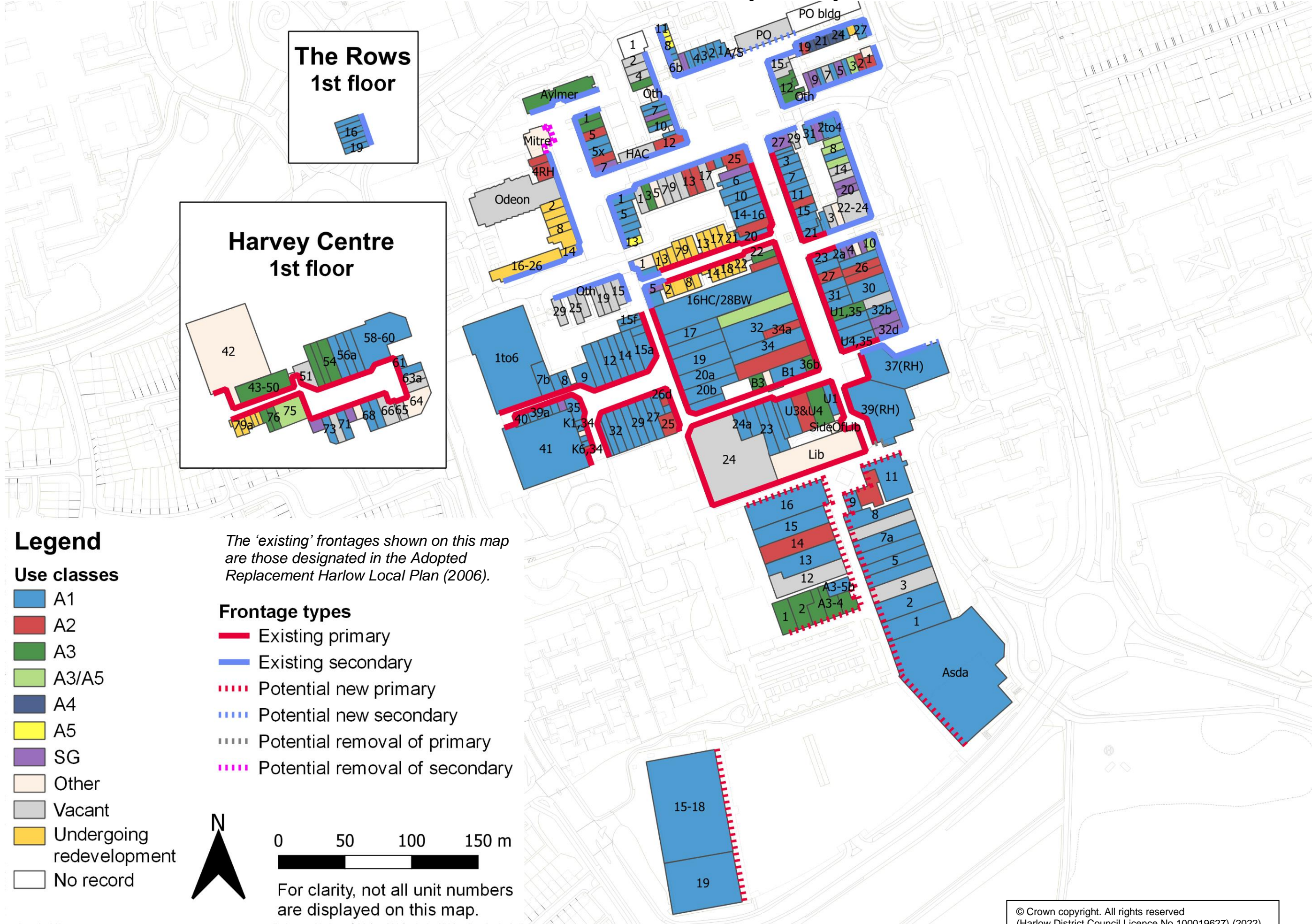
TOWN CENTRE (2022)



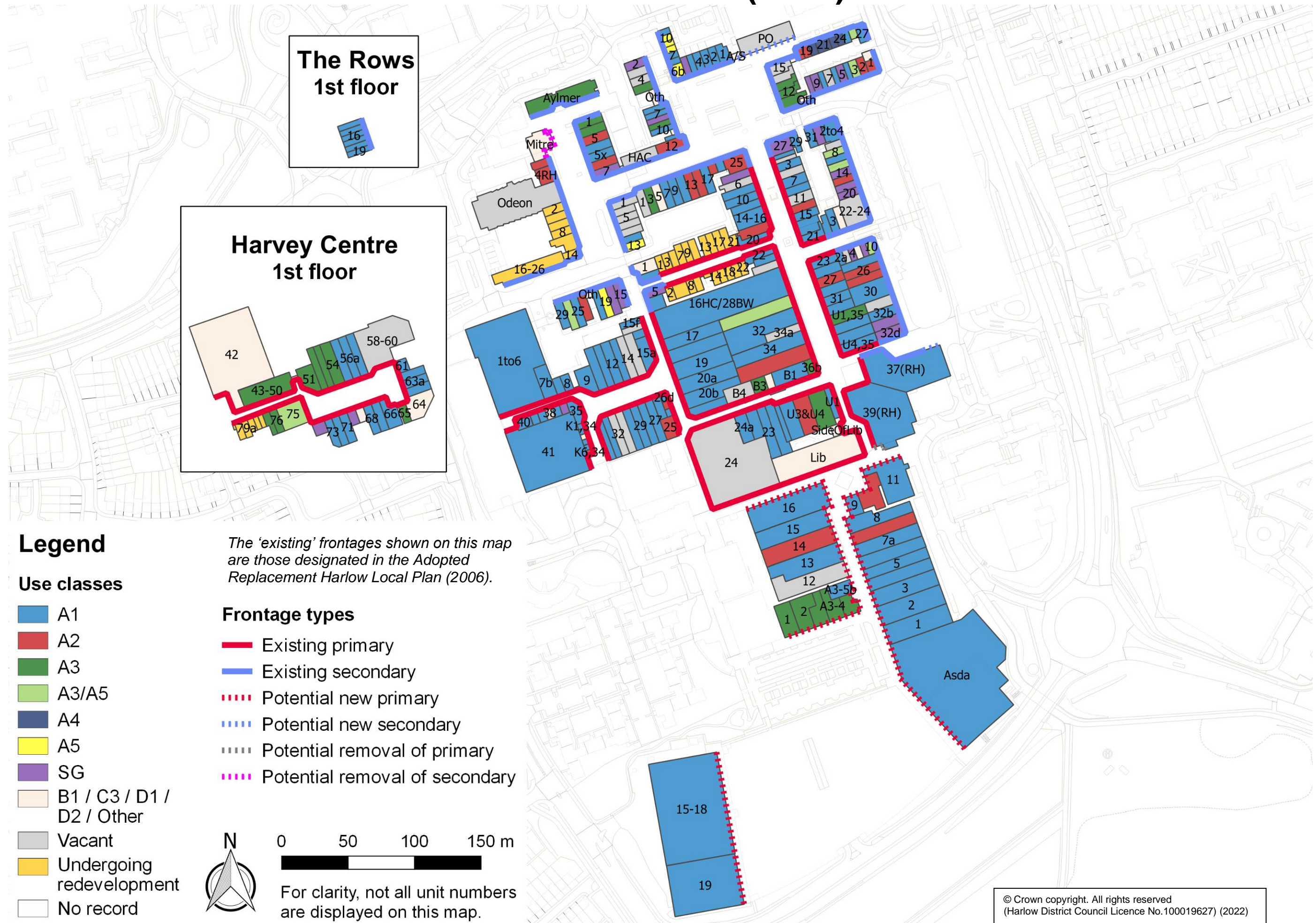
TOWN CENTRE (2021)



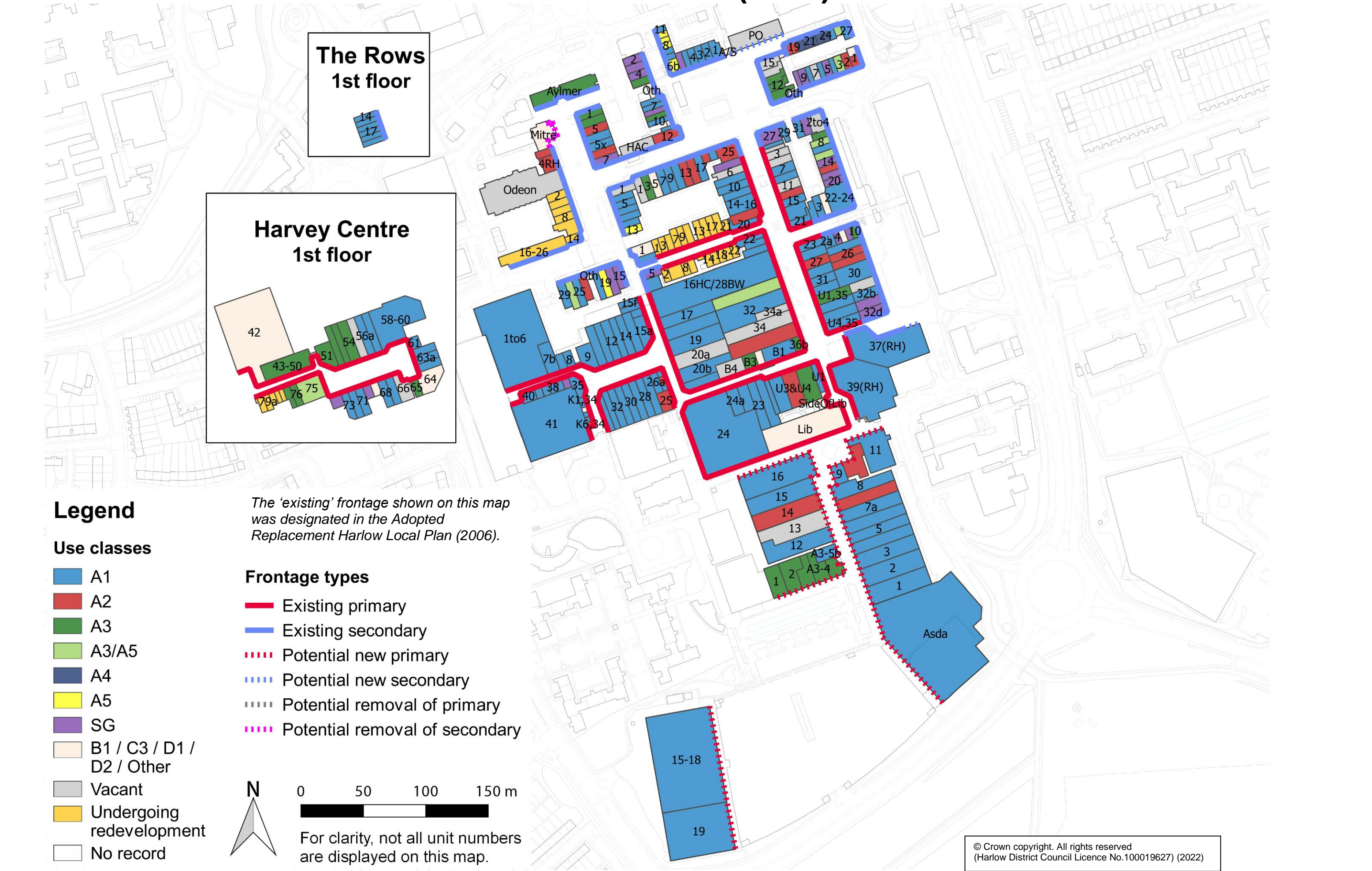
TOWN CENTRE (2020)



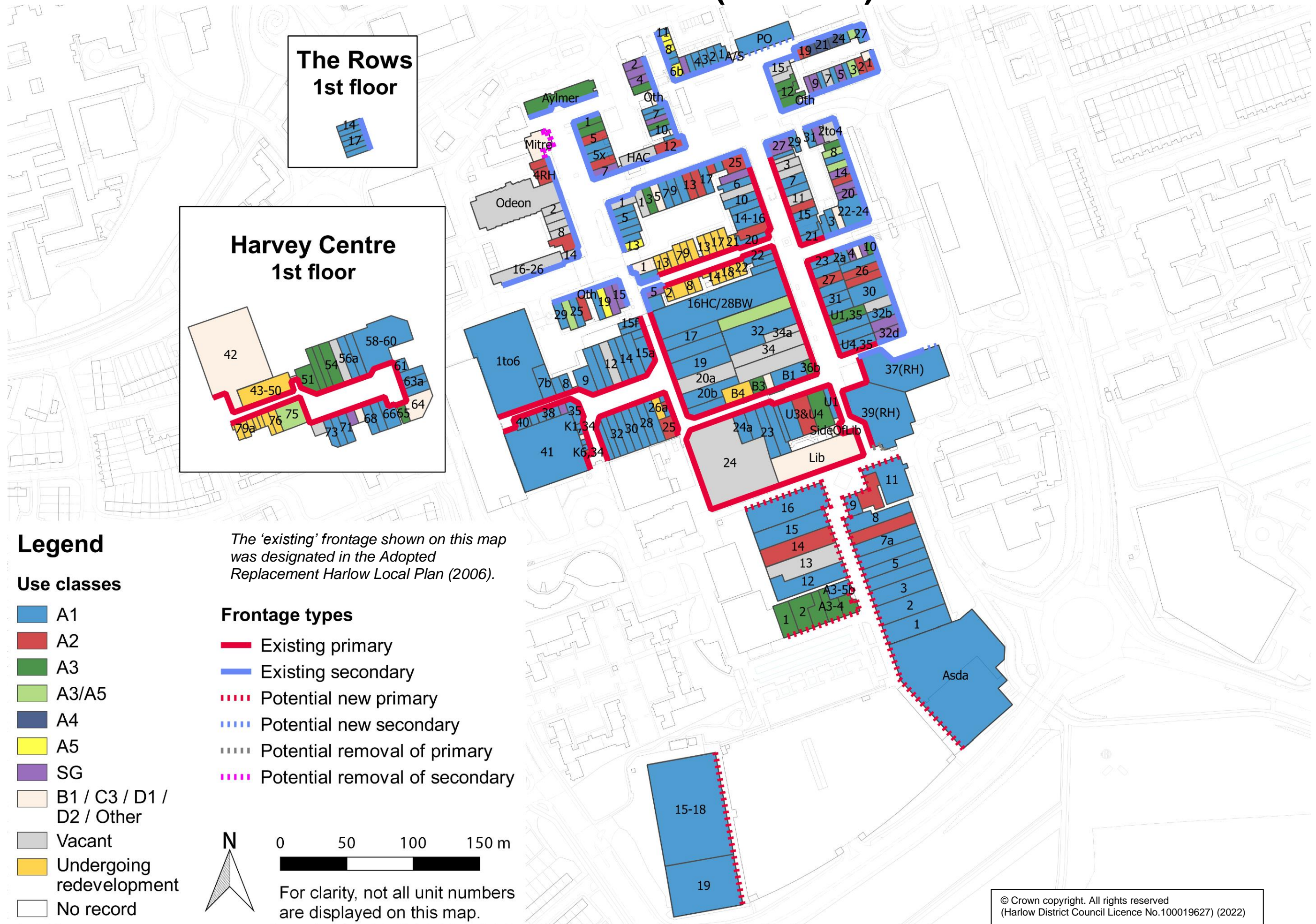
TOWN CENTRE (2019)



TOWN CENTRE (2018)



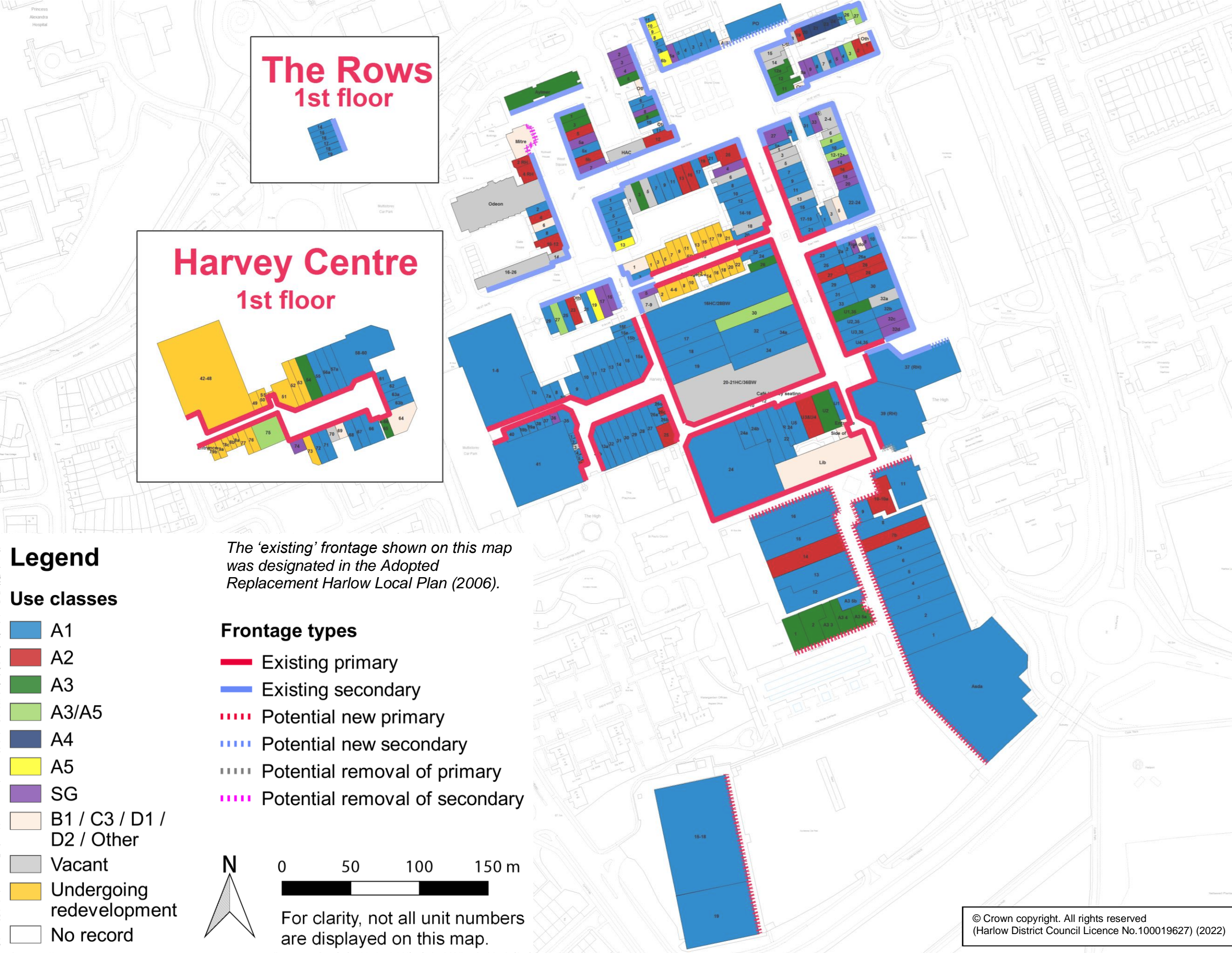
TOWN CENTRE (Jul 2017)



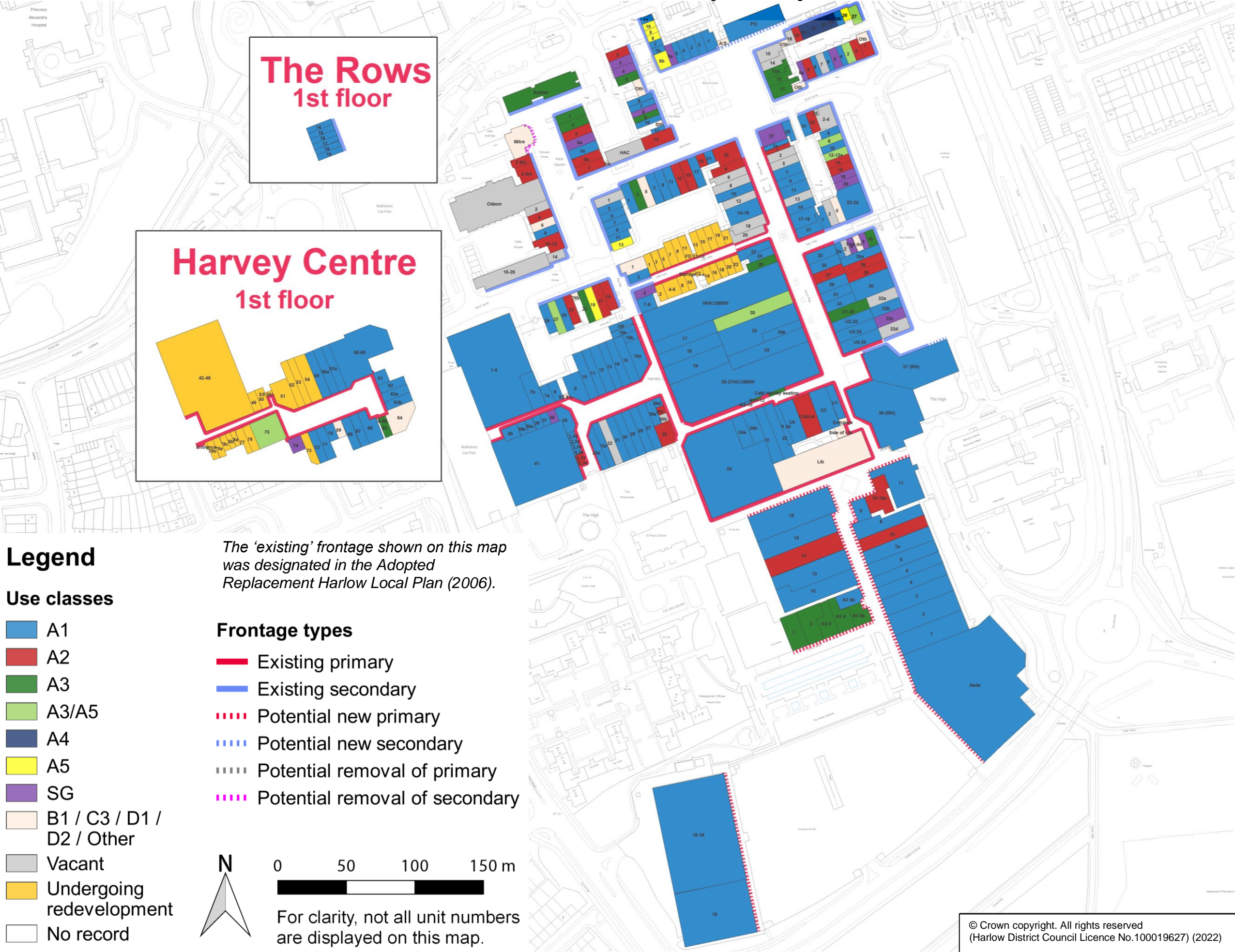
TOWN CENTRE (2017)



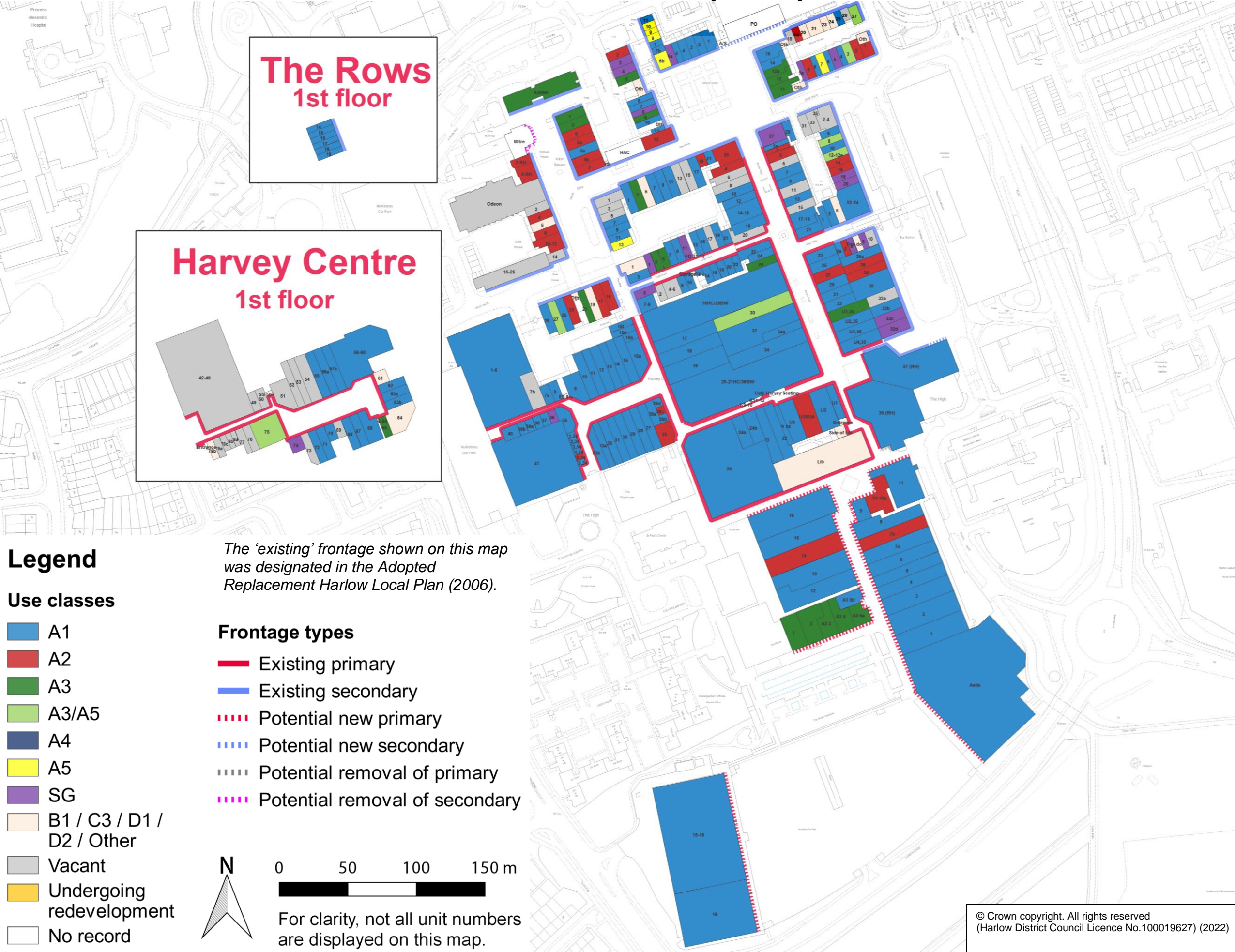
TOWN CENTRE (2016)



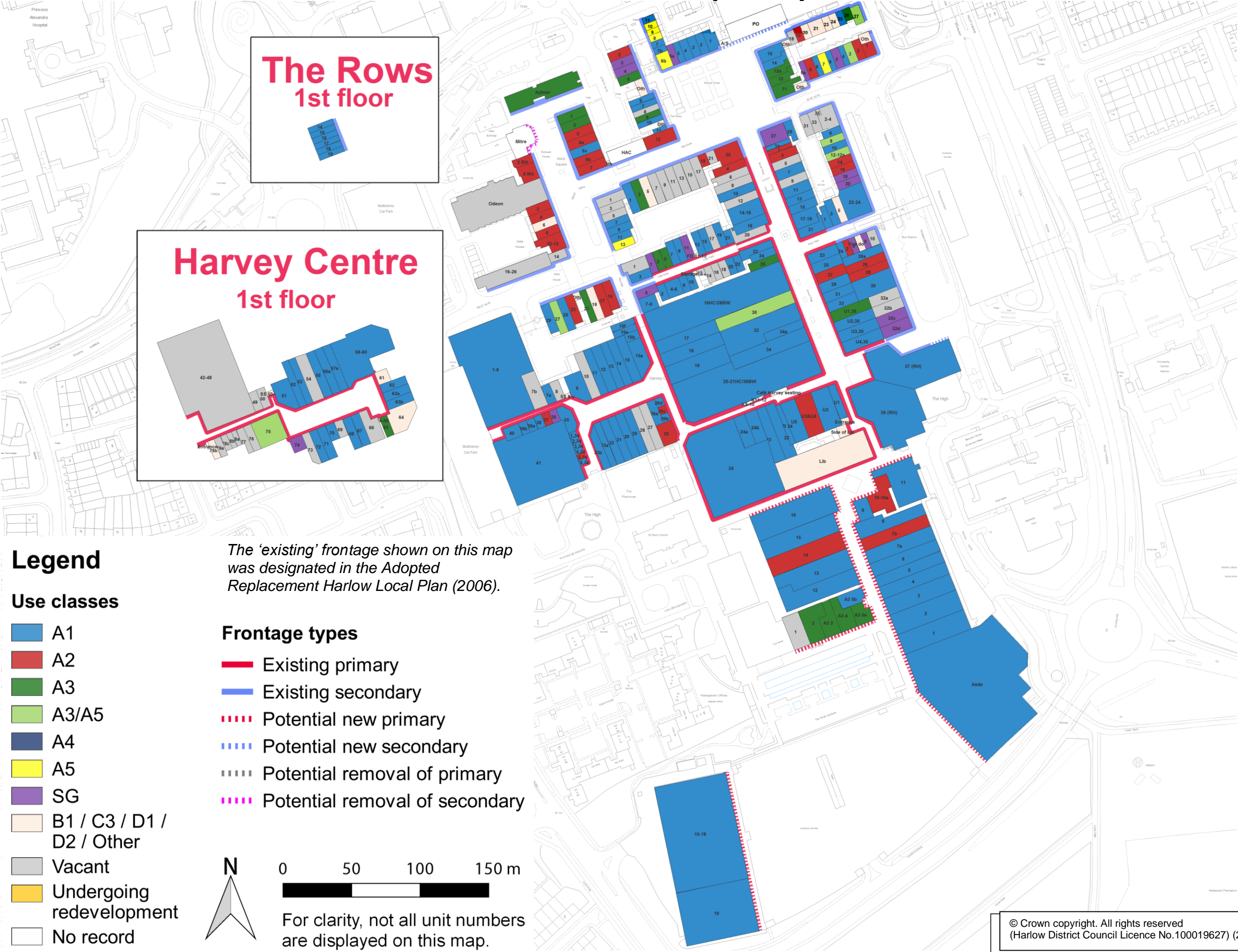
TOWN CENTRE (2015)



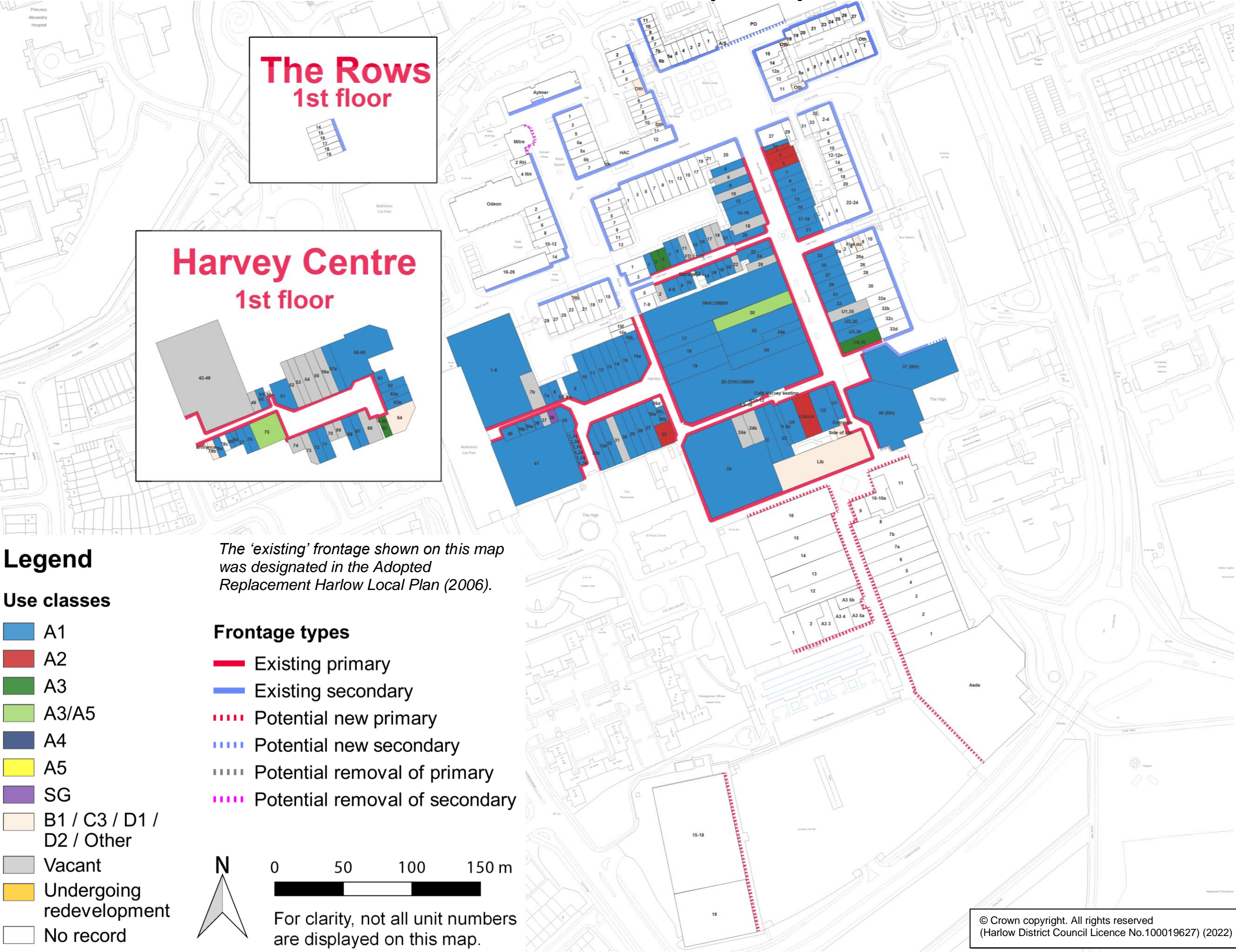
TOWN CENTRE (2014)



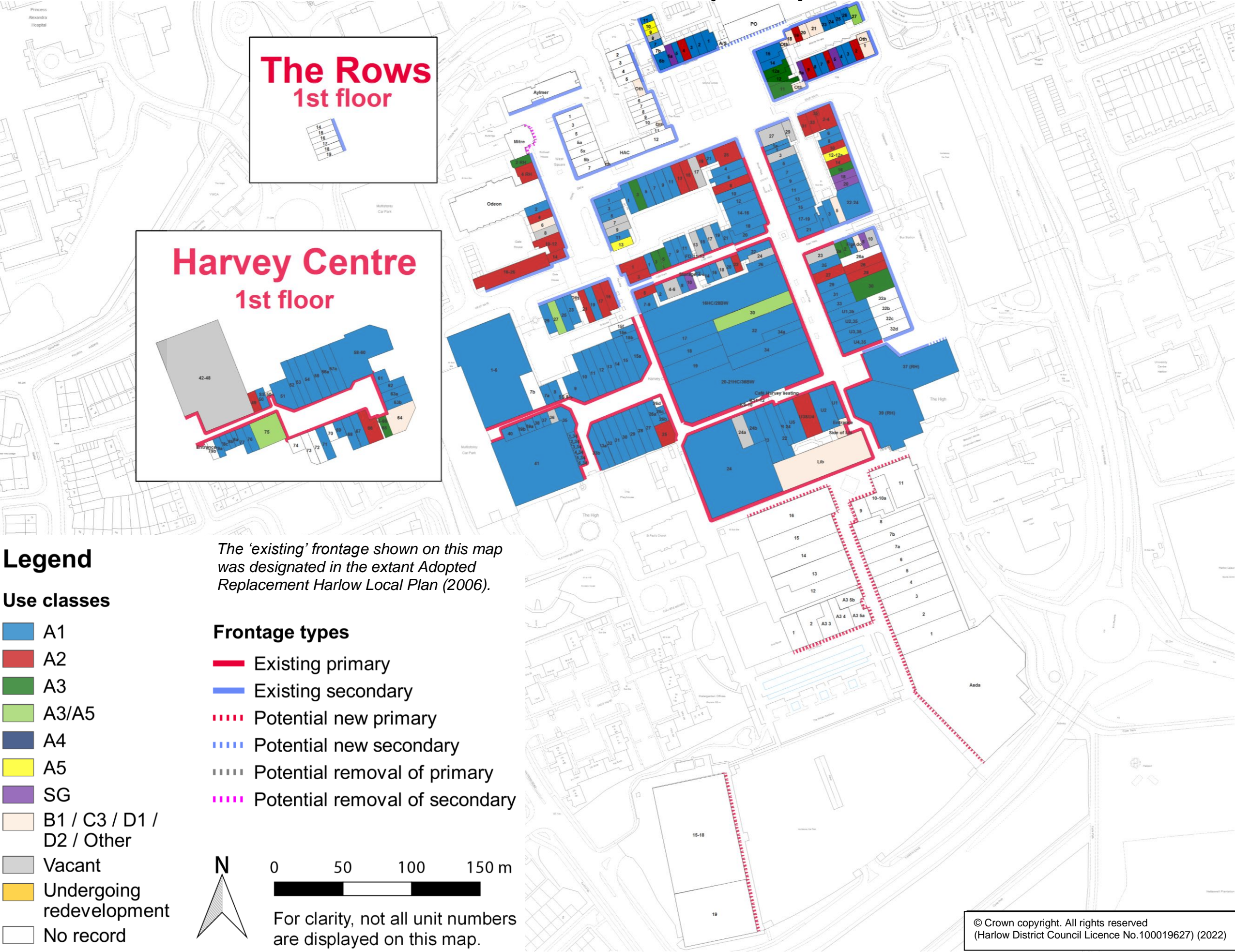
TOWN CENTRE (2013)



TOWN CENTRE (2009)



TOWN CENTRE (2003)

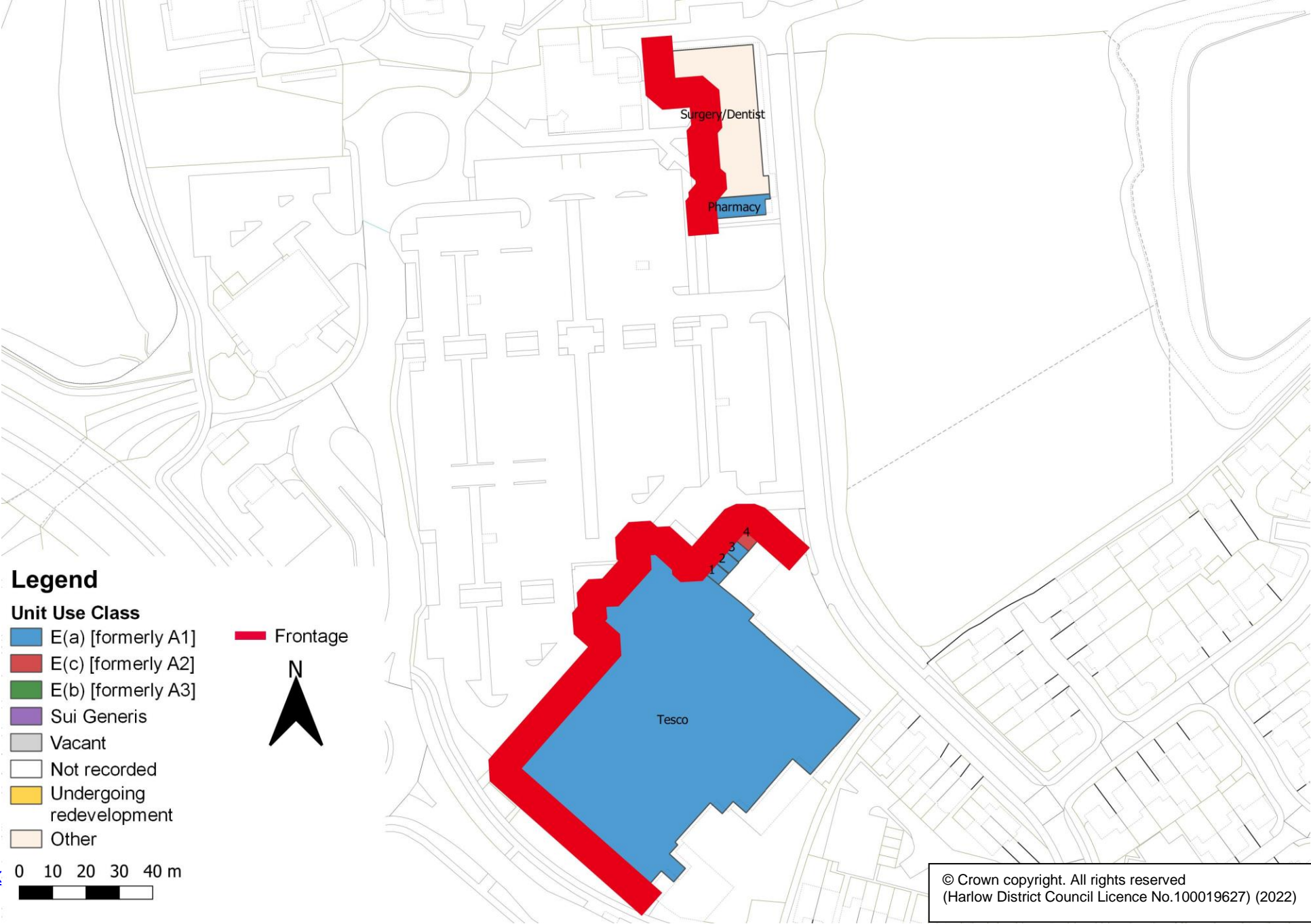


Appendix 2: Neighbourhood Centres & Hatches Maps (2022)

BUSH FAIR NEIGHBOURHOOD CENTRE

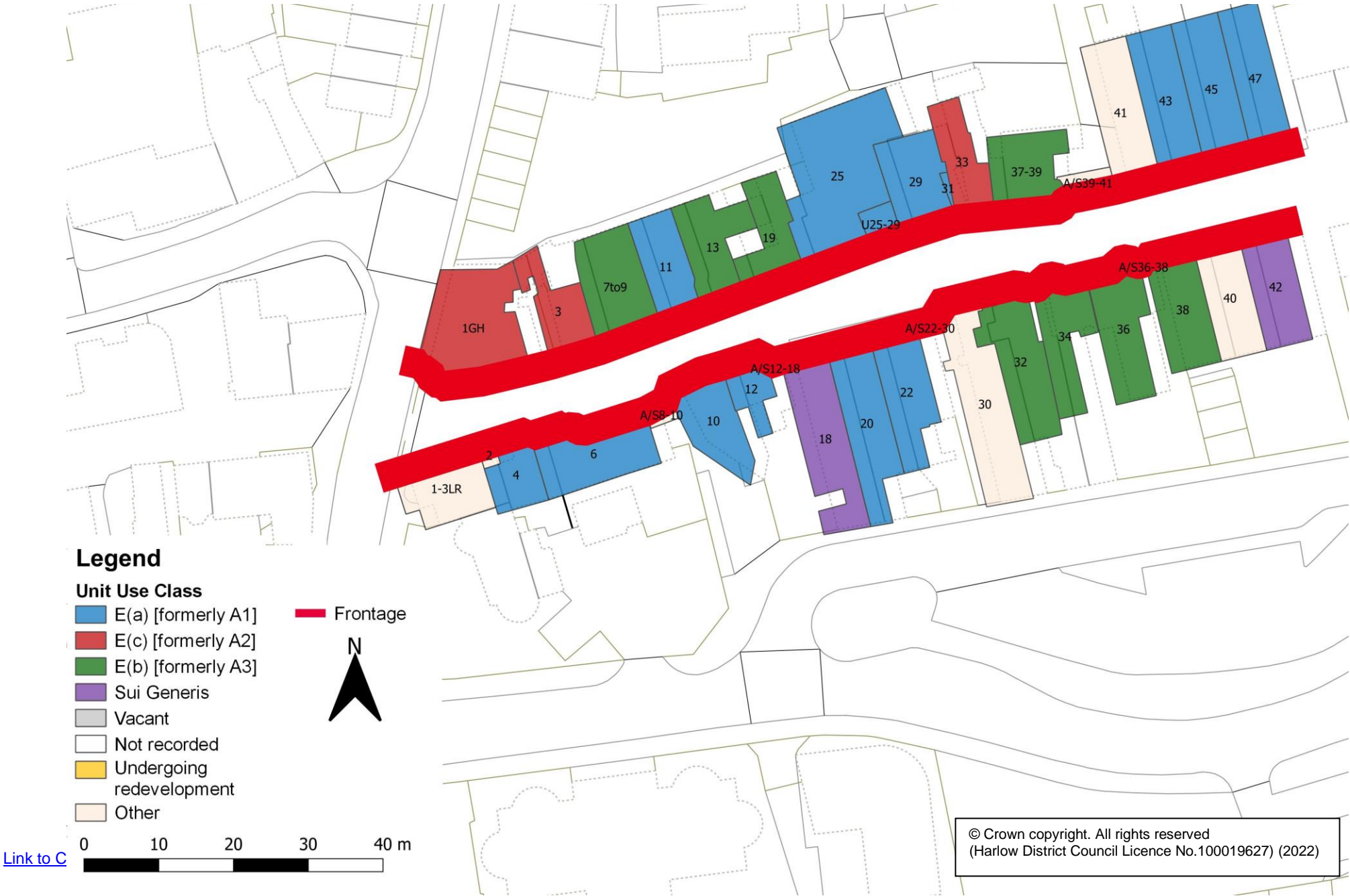


CHURCH LANGLEY NEIGHBOURHOOD CENTRE

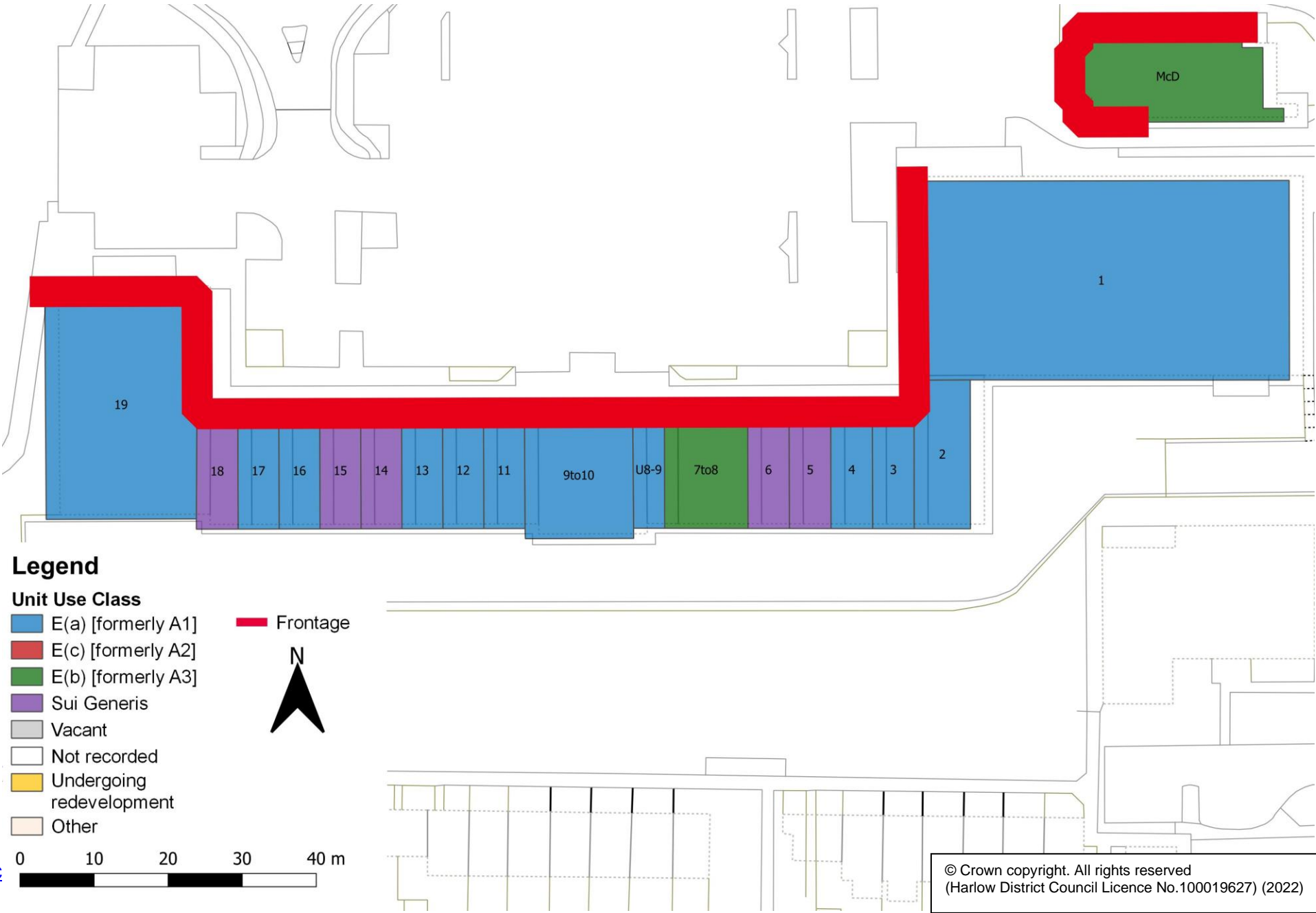


[Link to](#)

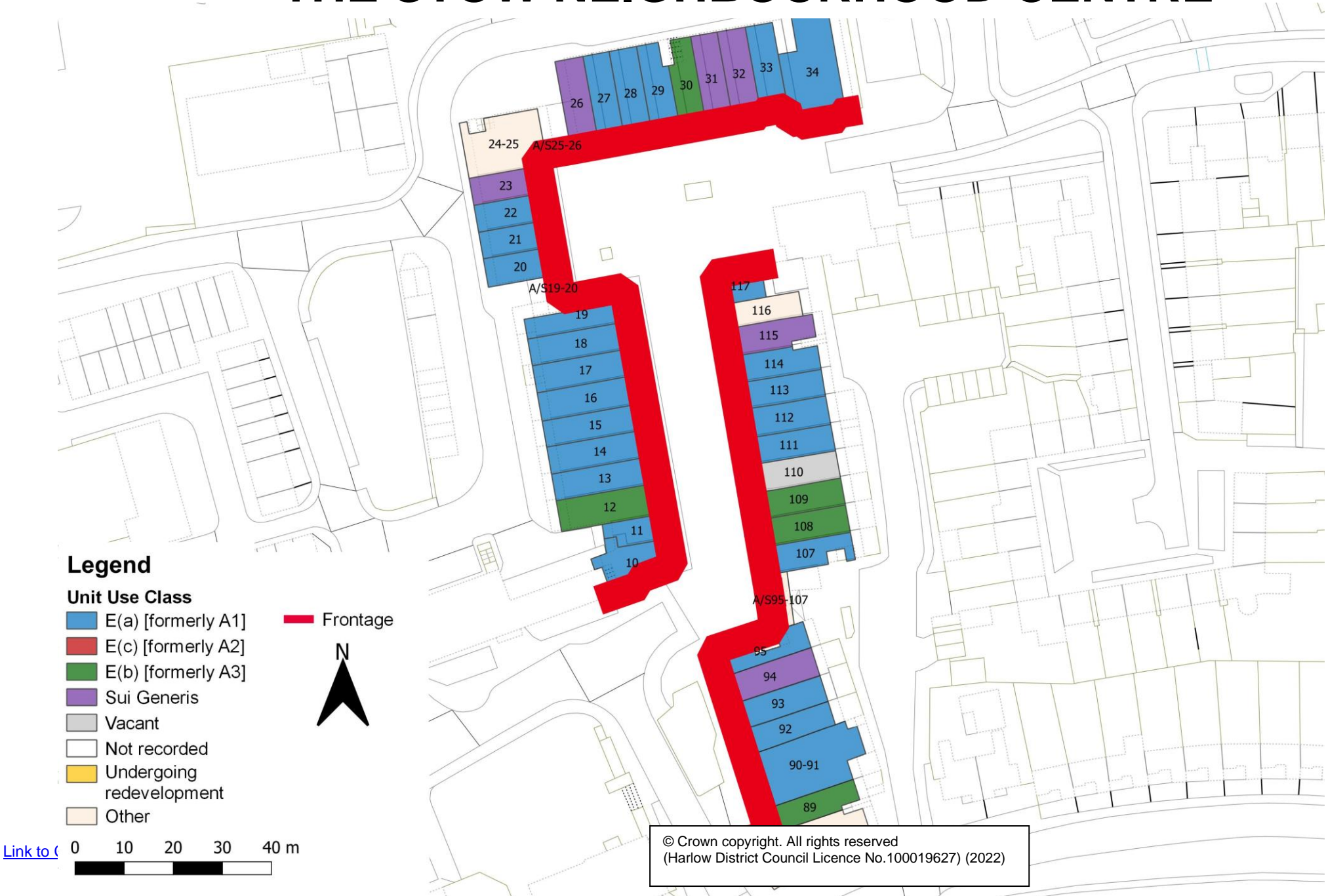
OLD HARLOW NEIGHBOURHOOD CENTRE



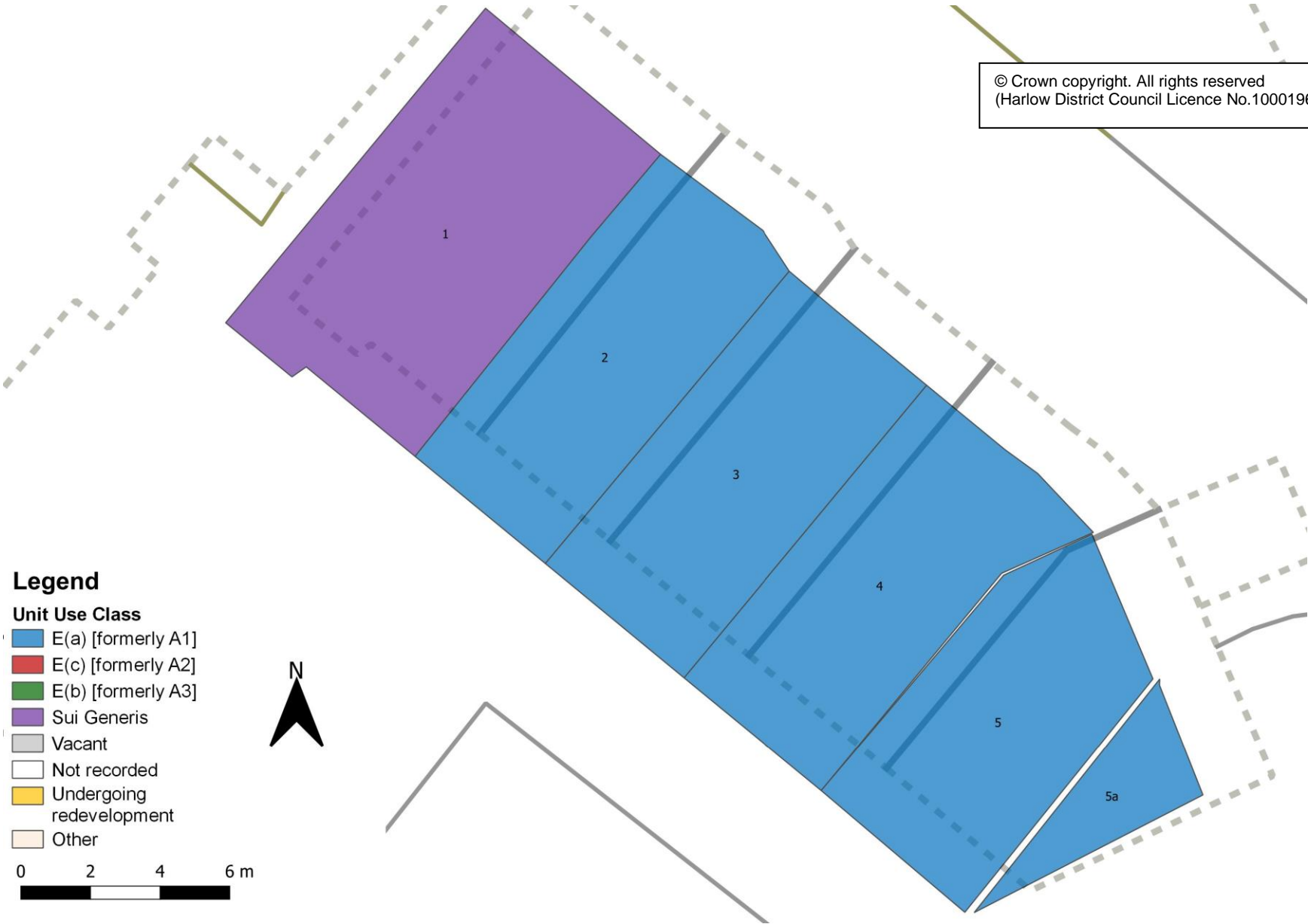
STAPLE TYE NEIGHBOURHOOD CENTRE



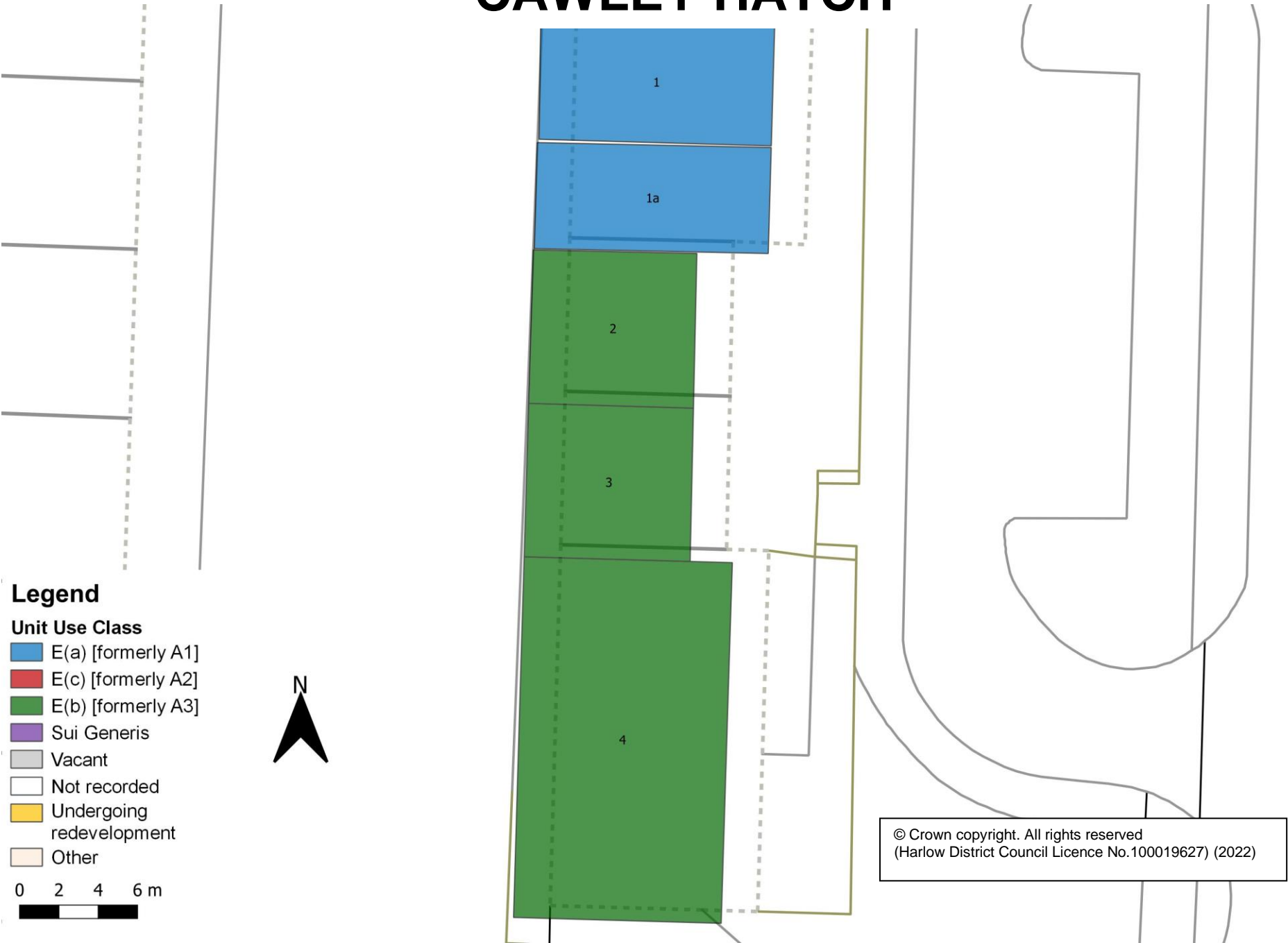
THE STOW NEIGHBOURHOOD CENTRE



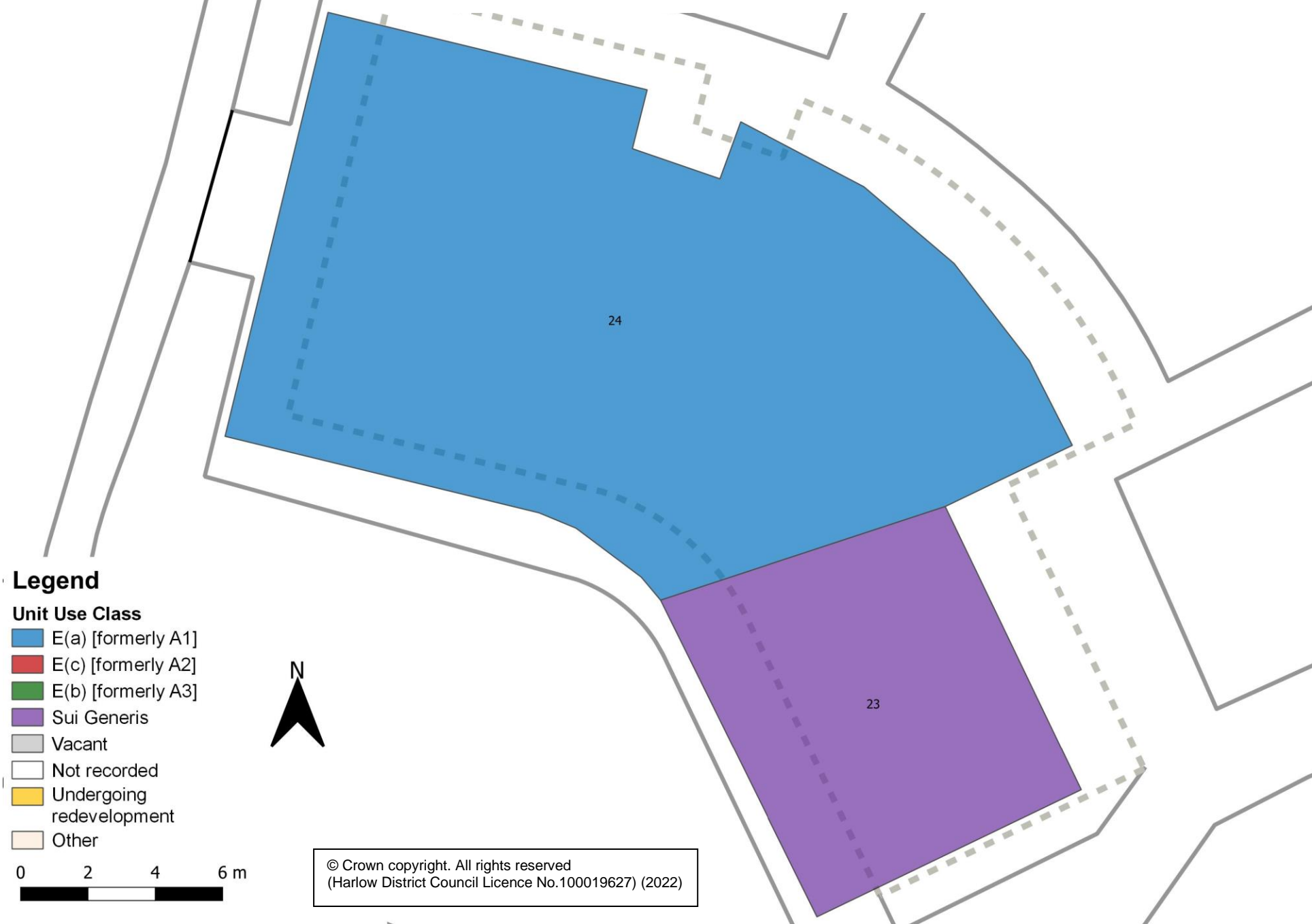
BURGOYNE HATCH



CAWLEY HATCH



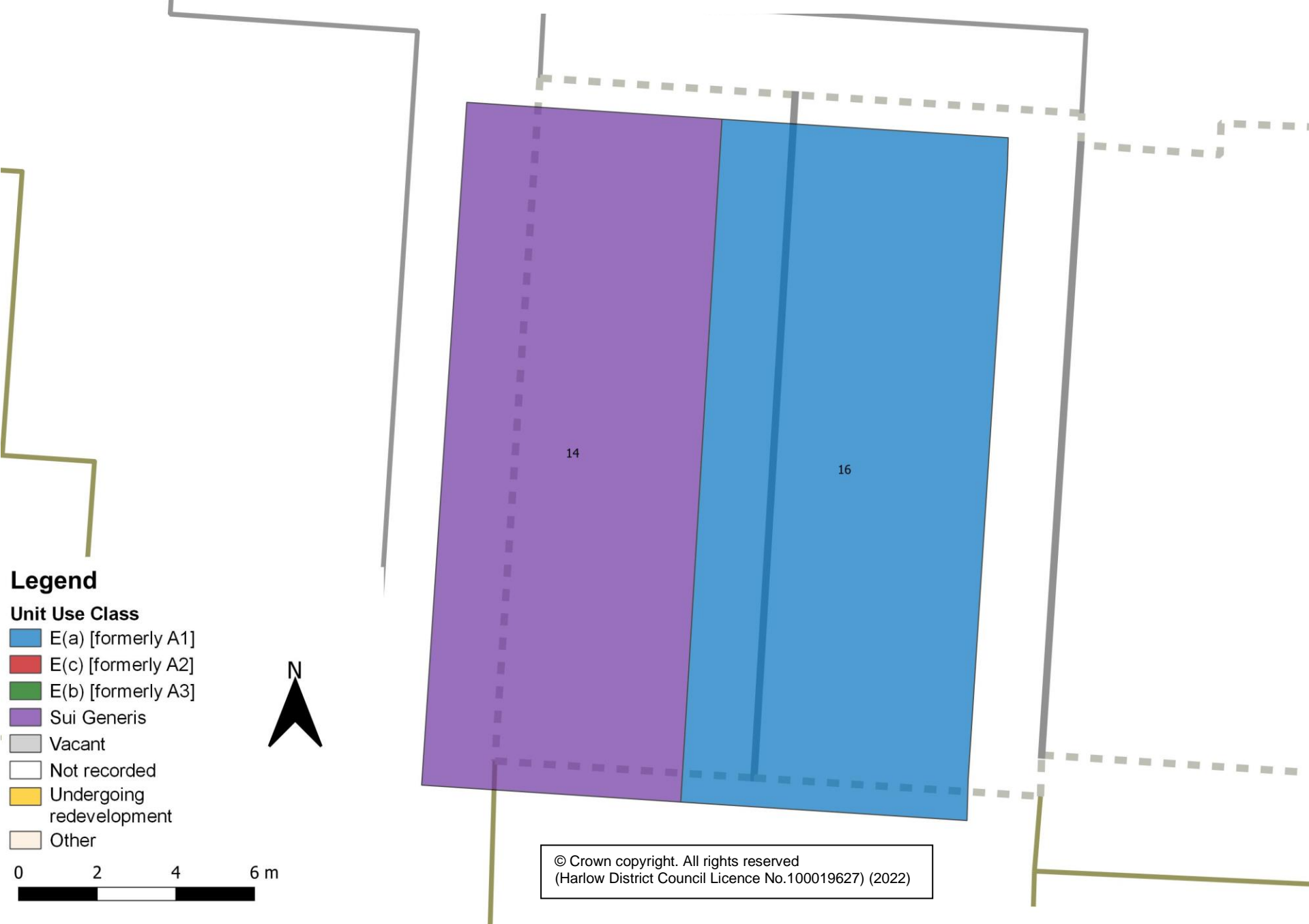
CLIFTON HATCH



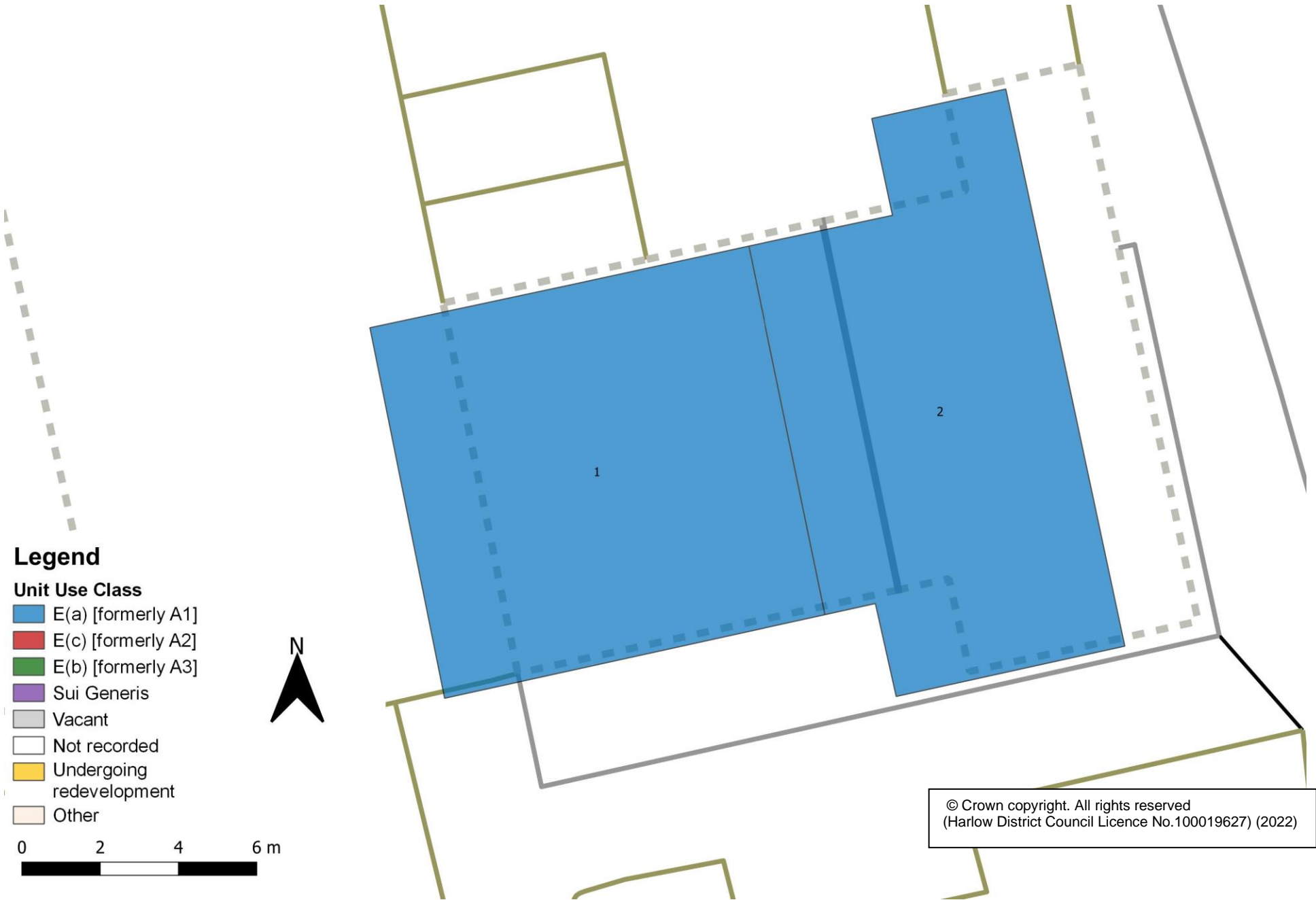
COLT HATCH



COPPICE HATCH



ELM HATCH



FISHERS HATCH



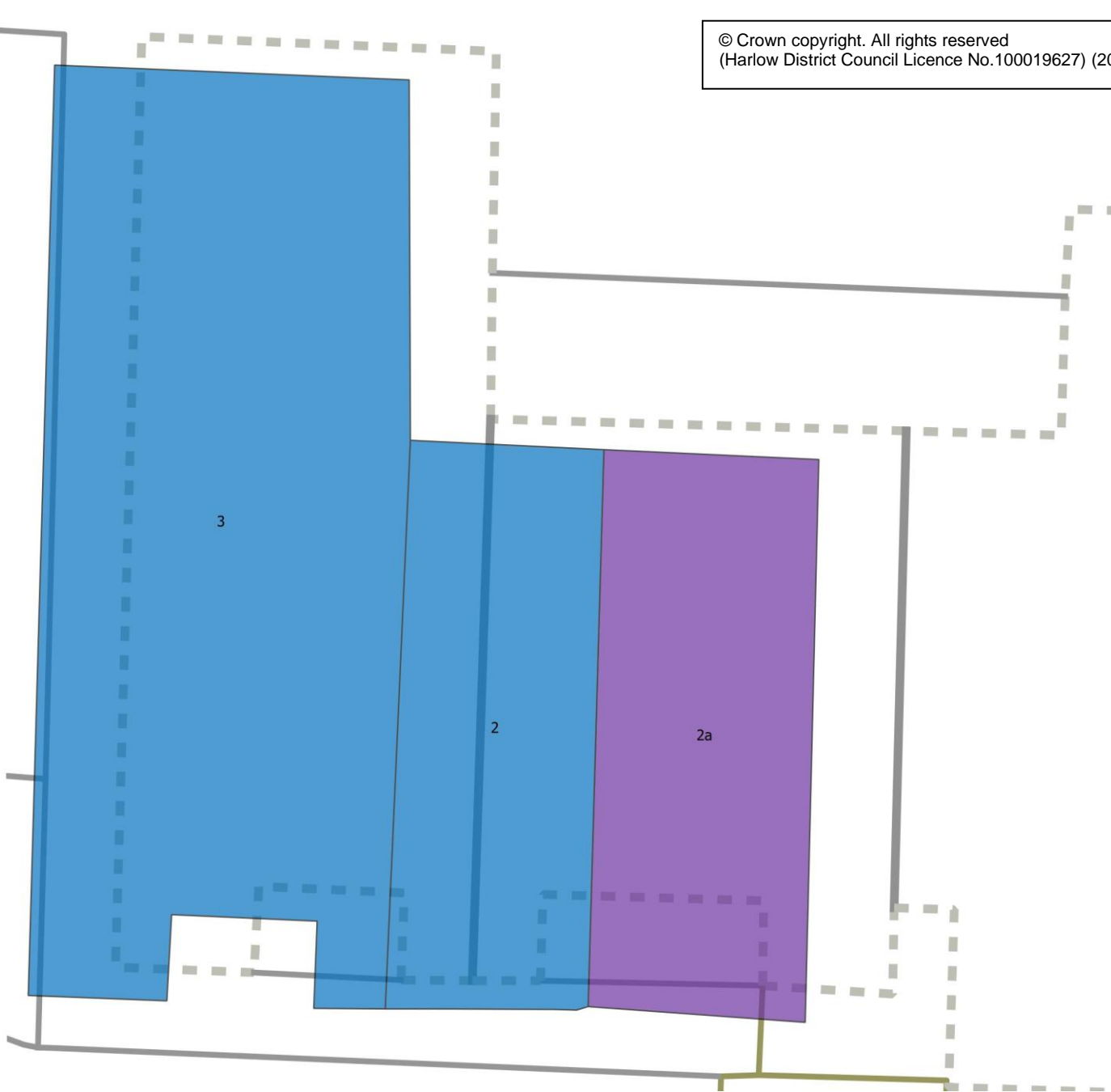
KATHERINES HATCH

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Legend

Unit Use Class

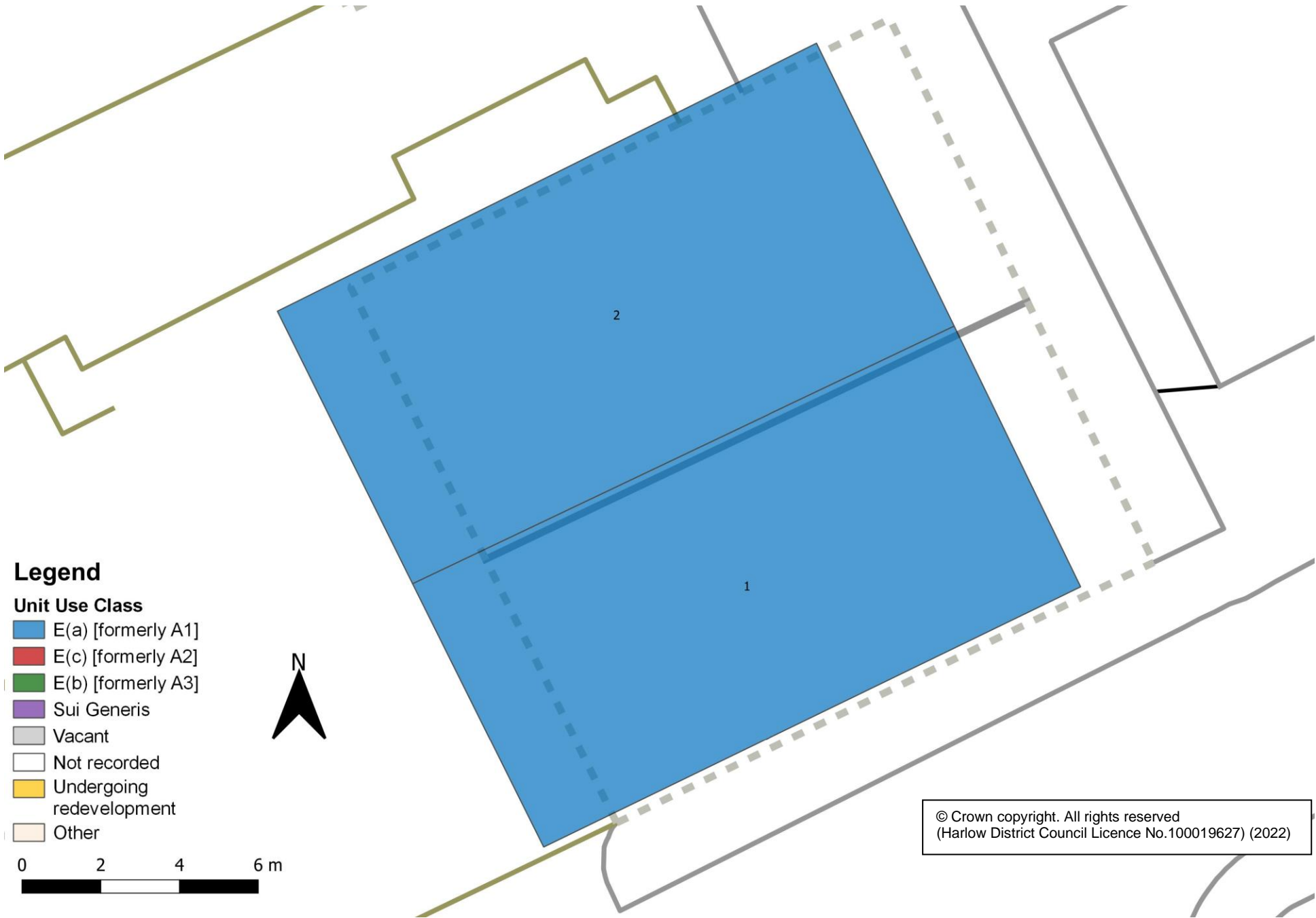
- E(a) [formerly A1]
- E(c) [formerly A2]
- E(b) [formerly A3]
- Sui Generis
- Vacant
- Not recorded
- Undergoing redevelopment
- Other



MANOR HATCH



MAUNDS HATCH



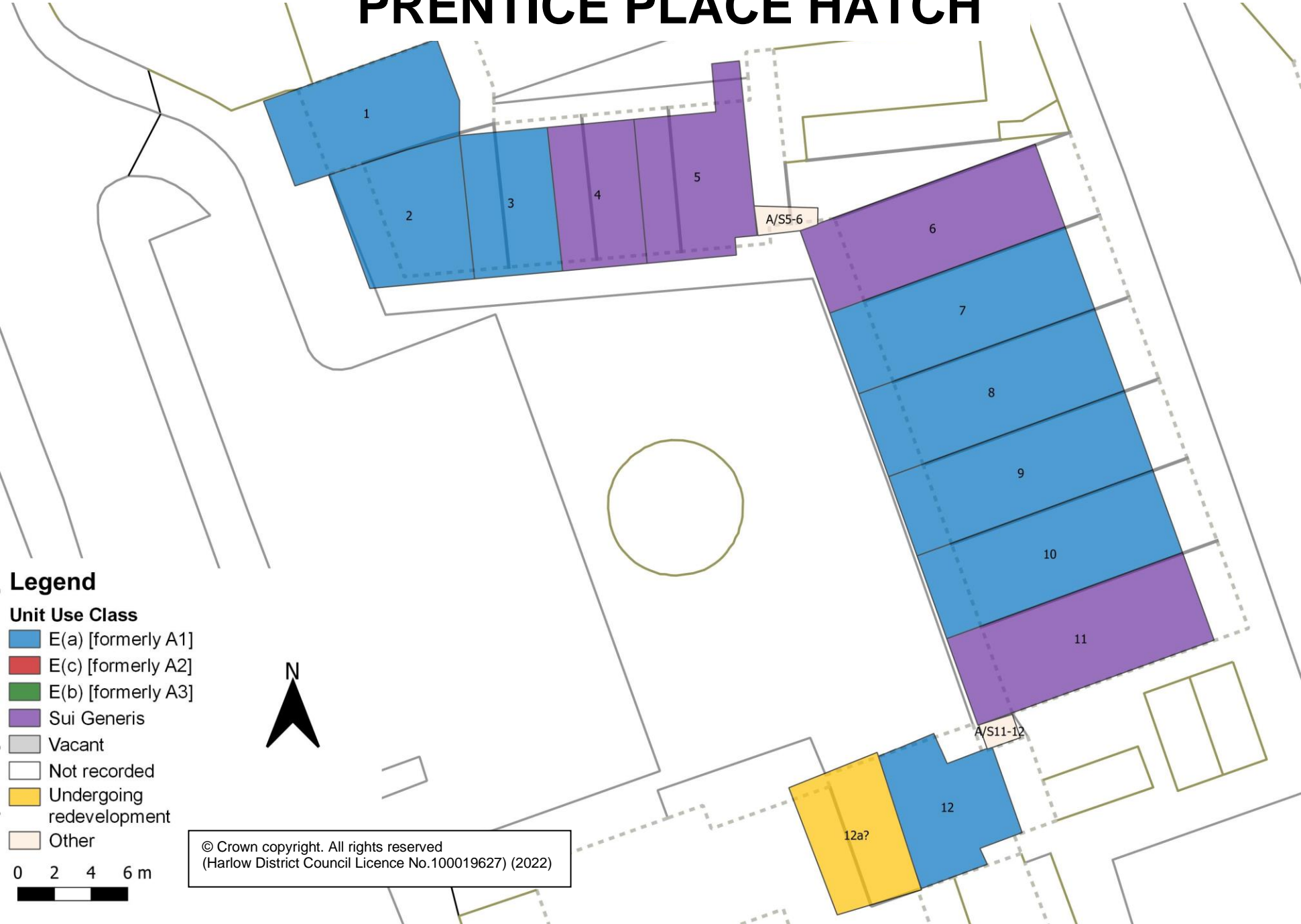
MILL HATCH



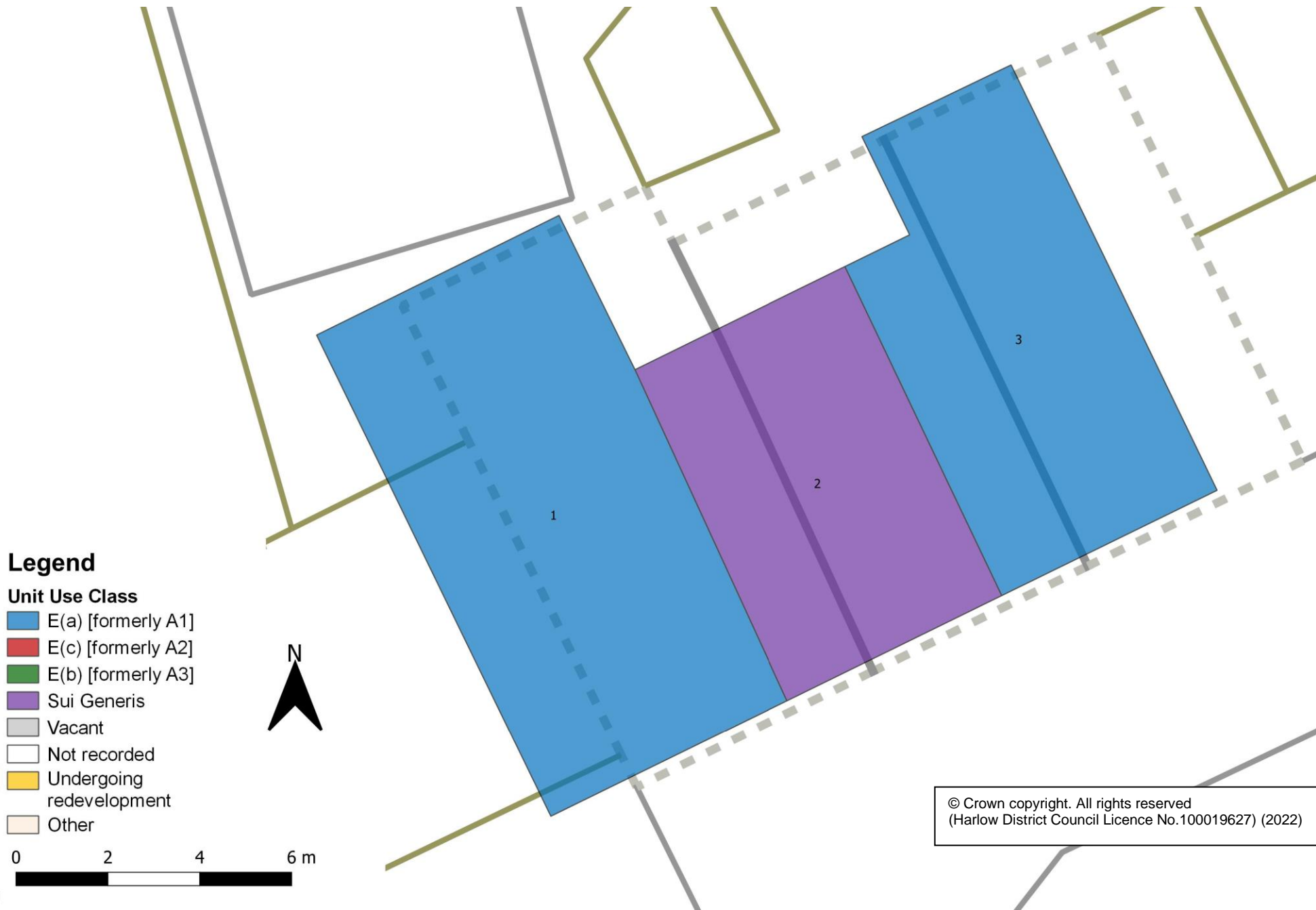
POLLARD HATCH



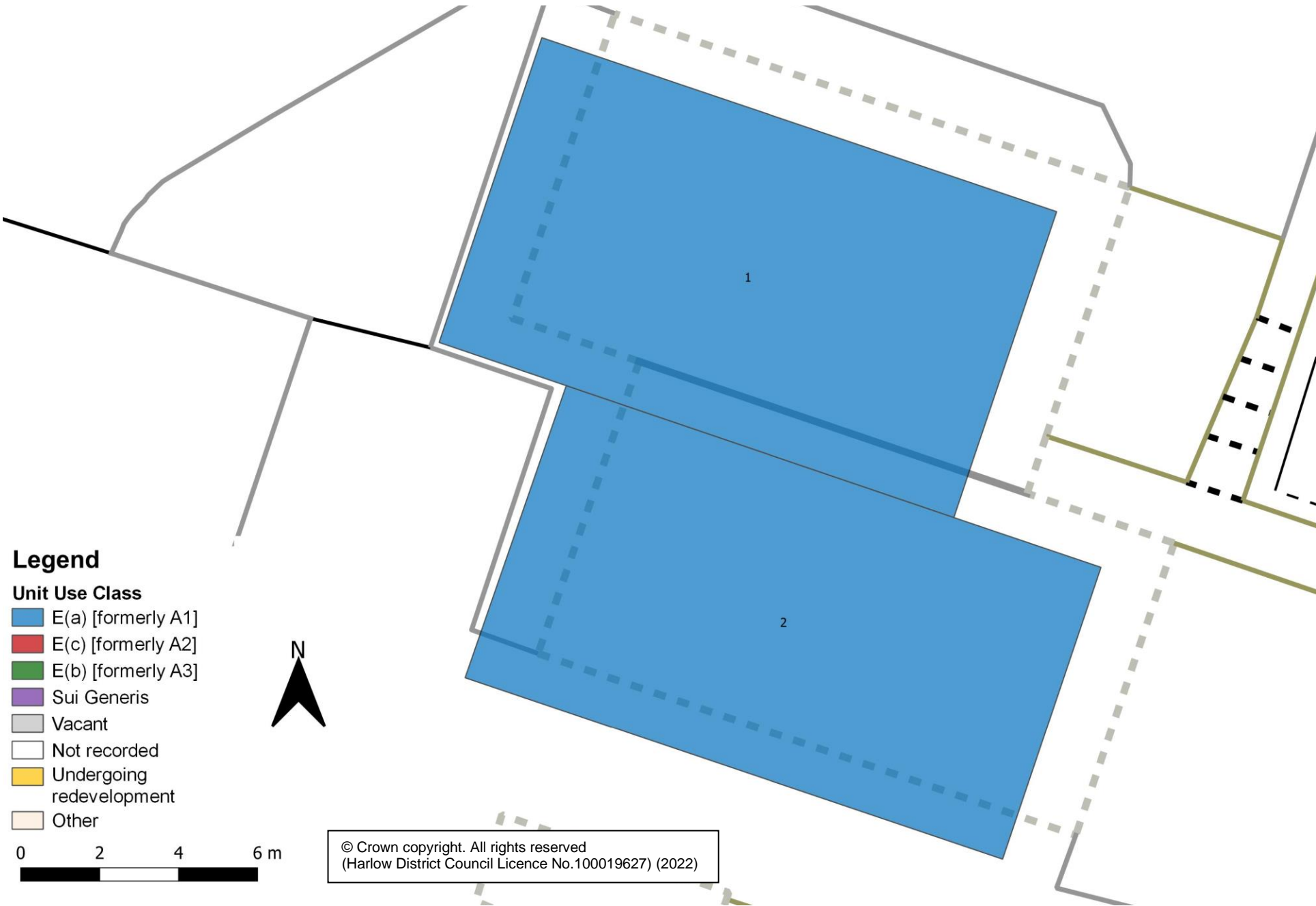
PRENTICE PLACE HATCH



PYPERS HATCH



SHERARDS HATCH



SLACKSBURY HATCH



SUMNERS HATCH



WARD HATCH

